Workshare Professional

Secure Document Compliance for Microsoft Office

4.5

Workshare Professional User Guide

Company Information

Workshare Professional® User Guide

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About This Guide

This guide describes how to use Workshare Professional, designed to work in-line with Microsoft Office and safely control the flow and auditability of document events inside and outside the perimeter across email servers, portals and repositories.

This guide includes the following chapters:

Chapter 1: Introducing Workshare Professional, provides an overview of the Workshare Professional functionality as well as a summary of the key features and benefits.

Chapter 2: Getting Started, describes the Workshare Professional working environment and provides an overview of the tools available.

Chapter 3: Sending Documents for Review, describes how to send document to other people for review.

Chapter 4: Receiving Files for Review, describes the options available when a document is received for review.

Chapter 5: Managing Responses, describes how to import responses and manage the changes proposed by reviewers.

Chapter 6: Comparing Documents from within Microsoft Word, describes how to compare documents using Workshare Professional from within Microsoft Word.

Chapter 7: Comparing Documents Using Workshare DeltaView, describes Workshare DeltaView, a standalone application included with Workshare Professional that enables you to compare two documents.

Chapter 8, Managing Content Risk in Documents, describes how to view and alert visible content violations such as financial, intellectual property, and personal content violations; and hidden data such as track changes, comments and footnotes that may have been added to a document. Additionally, this chapter describes how to display a report of all the content risk in a document and remove selected hidden data from a document.

Chapter 9, Protecting Email Attachments, describes the email protection options provided by Workshare Professional, such as the alerting of visible content violations, the removal of hidden data from email attachments and the conversion of email attachments to PDF.

Chapter 10, Controlling Documents, describes how to control your documents by setting restrictions on whether or not they can be emailed.

Chapter 11, Converting to PDF, describes how to convert your documents to PDF using Workshare Professional.

Chapter 12, Creating Reports, describes how to create different reports using the Workshare Professional Report Wizard.

Appendix A, Offline Mode, describes how to use Workshare Professional when working with DMS documents in offline mode.

Appendix B, Configuring Rendering Sets, describes how to configure rendering sets in Workshare Professional and apply them to a comparison.

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Chapter 1: Introducing Workshare Professional

This chapter introduces Workshare Professional, providing an overview of how it works as well as a summary of the key features and benefits. It includes the following sections:

- **What is Workshare Professional?**, below, introduces Workshare Professional.
- **How Does Workshare Professional Work?**, page 10, provides an overview of how Workshare Professional functions.
- **Terms and Concepts**, page 12, introduces the common terms and concepts used in Workshare Professional and in this guide.

WHAT IS WORKSHARE PROFESSIONAL?

Workshare Professional is a desktop application that automates managing changes to business documents. It reduces frustration and delays by finding and incorporating changes in important documents. Workshare Professional is for anyone who works with business documents.

Workshare Professional is designed for the way that you work – within Microsoft Office. Workshare Professional integrates with your existing desktop productivity software Microsoft Word, Excel and PowerPoint and your email applications such as Microsoft Outlook, IBM Lotus Notes or Novel GroupWise. In addition, many companies use Document Management Systems (DMSs) to track and store key documents and Workshare Professional integrates out of the box with several leading DMSs.

Workshare Professional Functionality

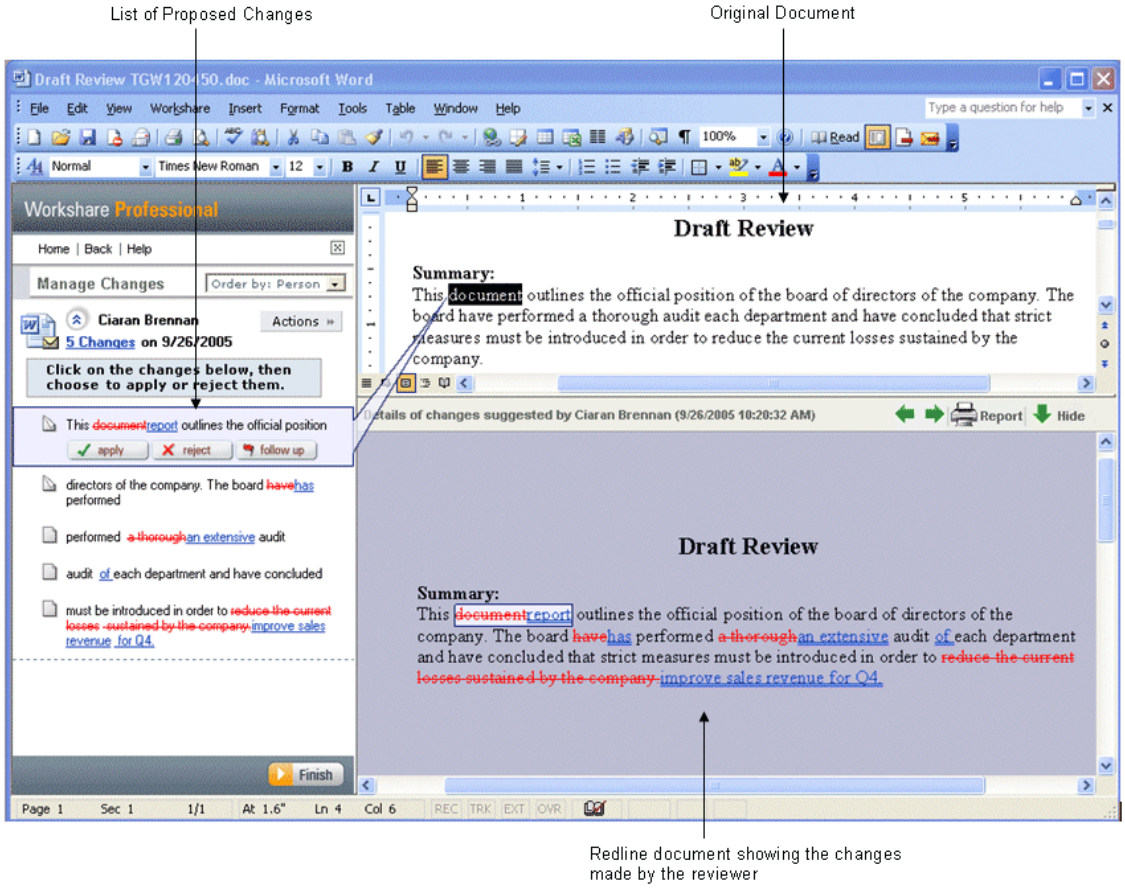
Workshare Professional provides the following functionality:

Document Review

Workshare Professional enables you to manage changes to business documents rapidly and easily. Workshare Professional automatically finds changes proposed to a document by other people, preventing the need to 'cut-and-paste' or manually re-type suggestions into the document.

Workshare Professional enables you to easily send a document (See *Content Risk Protection* below) to several people. When a document is sent using Workshare Professional, it is 'tagged' so that when colleagues return a changed document to you via email, Workshare Professional recognizes the revised document as a revision to your original. Whenever any attachments that contain suggested changes to your documents are opened from your email, Workshare Professional automatically analyzes the documents for suggested changes. Workshare Professional identifies all changes made to the document, regardless of whether the reviewer used track changes or not.

Workshare Professional then provides an intuitive and simple way to review, understand, and incorporate changes to a Microsoft Word document. Multiple suggestions from several people are presented in a concise consolidated view within Microsoft Word. This consolidated view enables you to act upon each change - to apply, reject, or flag for follow-up.



In addition, Workshare Professional preserves the technical integrity and style of the document – preventing your document from becoming corrupt or inadvertently incorporating foreign formatting or style. This not only benefits you through higher document quality, but also through increased productivity as well as reducing stress at deadlines.

Comparison

Workshare Professional enables you to compare two documents and instantly see any differences between them. For users who have a DMS, Workshare Professional provides access to version information stored in the DMS. Understanding differences between one version of a document and the next is a critical function when editing and reviewing documents in multi-user environments. Workshare Professional utilizes Workshare DeltaView - the market-leading and most advanced comparison engine in the market today, to perform comparisons accurately and seamlessly. Comparison results are displayed within Microsoft Word or in a separate Workshare DeltaView window.

Workshare Professional's fast, accurate and reliable document comparison capabilities enable you to quickly compare even the most difficult and complex documents.

Content Risk Protection

Workshare Professional prevents users from accidentally emailing confidential information that is stored in a Microsoft Office document. Workshare Professional automatically enforces your company policies for content risk, and can remove content risk automatically and seamlessly. Content risk is comprised of hidden data and content policy violations. Workshare Protect alerts you to the content policy violations and allows you to clean hidden data contained within the document.

Workshare Professional can be configured to define your company's content risk policies when sending documents internally or externally. These policies can differ when a document is sent internally or externally. Content risk is categorized into low, medium and high risk levels, and each category can be configured by the user. For example: You may not want hidden server names and users details to be included in documents sent externally, but it may be fine to leave those details in documents sent within the organization.

Workshare Professional alerts users to content policy violations and removes sensitive hidden data from documents before they are sent ensuring that the recipient of the document only has knowledge of what the document sender intended.

Hidden data is hidden information that is contained in Microsoft Office documents. Whenever you create, edit or save a document, hidden data is added to the document. Hidden data includes information such as:

- Track changes, comments, and footnotes
- Administrator-defined hidden data such as author's name, server names, keywords, routing slips and authoring trails
- Previous versions of the document

Content policy violations occur when documents contain sensitive privacy, intellectual property and financial disclosure information. Workshare Professional can be enabled to discovery sensitive information such as financial information, social security numbers, credit card numbers and profanity (optional). You can be alerted to these content policy violations when you generate reports, email documents and from the system tray Document Alerts tool.

NOTE: Workshare Professional alerts users to the existence of content policy violations but does not remove this content. Workshare Professional discovers content policy violations in Microsoft Word documents only.

Workshare Professional integrates with Microsoft Office providing an option to display a comprehensive report of all the content risk in a document while it is open in Microsoft Word, Excel and PowerPoint.

Document Restriction

Workshare Professional enables you to restrict access to sensitive business documents by applying restriction settings. These restrictions can prevent documents from being emailed either to any user, or to external users.

Workshare Professional provides the following levels of document security:

- **No Restriction**: The document is not restricted, and can be freely emailed to all recipients.
- **External Restriction**: The document can only be emailed to people within your organization. Email to external recipients will be blocked.

- **Full Restriction**: The document cannot be emailed to anyone. Any email containing this document will be blocked.

This Workshare Professional functionality is available from within Microsoft Word.

Document Alerts

Workshare Professional enables you to actively monitor the risk level of your active documents. This tool appears on your system tray and scans the active document on your computer and alerts you to content risk.

PDF Conversion

Workshare Professional enables you to quickly and easily convert Microsoft Office documents into PDF (Portable Document Format). This Workshare Professional functionality is available from within Microsoft Word, Excel and PowerPoint environments and by right-clicking closed Word, Excel and PowerPoint files on your desktop or DMS.

How Does Workshare Professional Work?

Workshare Professional provides sophisticated functionality that is convenient and accessible, enabling users to move smoothly between tasks and work rapidly to manage changes. Workshare Professional assists you throughout the complete document lifecycle – from document assembly, review, verification and security. Workshare Professional displays a simple and intuitive panel within Microsoft Word, Excel and PowerPoint enabling users to take advantage of available Workshare Professional functionality from within the application.

The Workshare Professional panel is task-oriented, guiding users through their document tasks in a clear, step-by-step format. Users may select Workshare Professional functions in any order, or simply use a single function.

When a business document is sent via email using Workshare Professional, the document is 'tagged.' When colleagues return a changed document to you as an attachment, Workshare Professional recognizes the revised document as a revision to your original. Workshare Professional then:

- Finds your original document and offers to open it, wherever it is stored.
- Automatically analyzes the revised document for changes and comments.
- Presents the suggested changes to you in an easy-to-understand format.
- Enables you to automatically accept changes and apply them to your document, reject changes, or flag changes for later follow-up.
- Enables you to view your colleague's original email at any time, wherever you have stored the email.

Workshare Professional has also made key functionality of the DMS available from the Microsoft Word environment. For example, Workshare Professional provides a list of the DMS versions of a document, enabling the comparison of document versions.

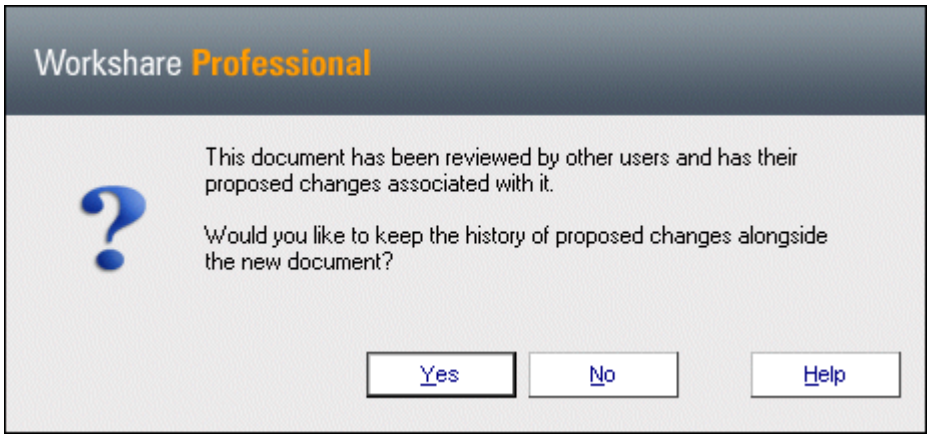
Document Audit File

When working with Workshare Professional, all data relating to your business document, for example, responses to a document sent for review, are stored inside a document audit file. This file is created automatically. It has the same name as the original file and a **.W3** extension. When your document is stored on your hard drive, the document audit file is stored at the same location as the original file. If your document is stored in a DMS, the document audit file is automatically added as a related file to the original document.

Workshare Professional and Documents Stored on your Computer

If you store your documents on your computer or on a network rather than a DMS, Workshare Professional enables you to re-use documents easily, either continuing to manage changes associated with a document or starting a document as a 'clean slate,' with no changes associated with it at all.

When a document has been reviewed and therefore has an associated document audit file, performing a Save As causes Workshare Professional to display a message asking whether to save the document as a new version keeping the responses associated with it (in which case the document audit file is copied) or to save it as a new document without the responses (in which case the document audit file is not copied, and you have a 'clean-slate' document).


Workshare Professional
This document has been reviewed by other users and has their proposed changes associated with it.
Would you like to keep the history of proposed changes alongside the new document?
Yes
No
Help

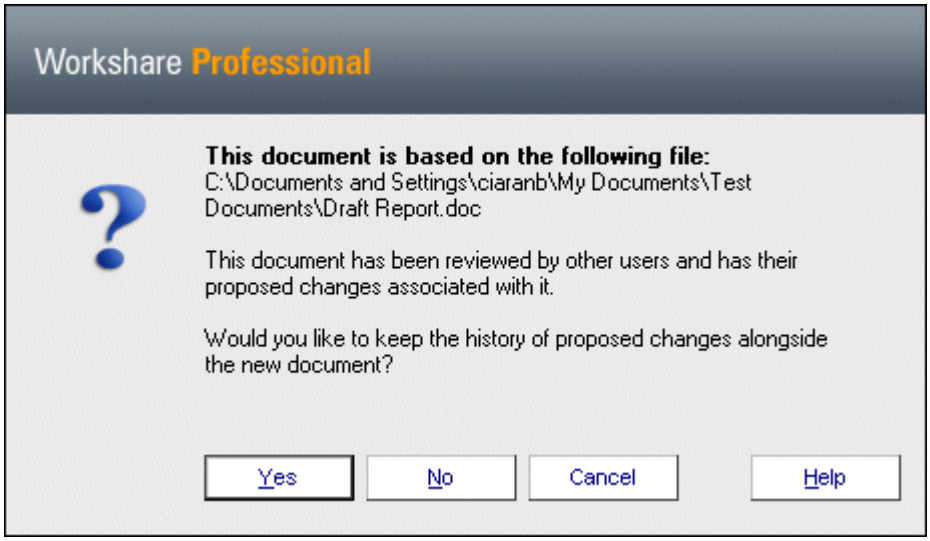
Selecting **Yes** saves the document in the specified location with the specified name and the document audit file is also copied to the same location. The document audit file is given the same name as the saved file with a **.W3** extension.

Selecting **No** saves the document but does not copy over the document audit file.

TIP: To assign the control of a document to somebody else, simply email them the document and its associated document audit file. This user will gain control over the document when the files are saved to their computer or network.

Moving and Copying Files

Workshare Professional can help you keep track of changes, even if you move your document to a different location. If you manually copy or move a Microsoft Word document on your computer, when you next open that document, Workshare Professional checks to see if your document used to have changes to it, and if the document audit file has also been moved. If it has not, the following message is displayed:


Workshare Professional
This document is based on the following file:
C:\Documents and Settings\ciaranb\My Documents\Test Documents\Draft Report.doc
This document has been reviewed by other users and has their proposed changes associated with it.
Would you like to keep the history of proposed changes alongside the new document?
Yes
No
Cancel
Help

Selecting **Yes** opens the document and copies the document audit file to the new location.

Selecting **No** opens the document but does not copy over the document audit file.

Terms and Concepts

The following terms and concepts are regularly used in Workshare Professional and throughout the documentation:

Term	Definition
Document Management System (DMS)	A system that enables organizations to centralize the management, storage, retrieval and distribution of documents. Furthermore, it enables a user to monitor and control modifications to a document while it is worked on by others.
Original Document	The document at the center of activity. This document can be compared against other documents or sent for review. The original document always stays in the DMS.
Response	A document that is returned after having been reviewed. This document includes proposed changes to the original document.
Modified Document	The document that is compared against the original document. The modified document is usually a copy of the original document that has been altered, perhaps by another user.
Redline Document	The document that results from a comparison of two documents, for example, the original document and an earlier version of the original document, or the original document and a response. The Redline document indicates the changes/differences between the two compared documents.

Term	Definition
Rendering Set	Rendering sets define how Workshare Professional represents changes in a document. For example, inserted text is shown in blue with double underline and deleted text is shown in ~~red with strikethrough~~. These display preferences can be amended by the user.

Chapter 2: Getting Started

This chapter describes the Workshare Professional working environment and provides an overview of the tools available. It includes the following sections:

- **Launching Workshare Professional**, below, describes how to access Workshare Professional functionality.
- **Workshare Menu**, page 15, describes the options available in the Workshare menu.
- **Workshare Panel**, page 17, describes the Workshare Panel and the options available from it.
- **Workshare Toolbar Buttons**, page 19, describes the Workshare toolbar buttons added to the Microsoft toolbar.
- **Workshare Document Alert**, page 20, describes the Workshare Document Alerts displayed in the system tray.
- **Enabling Workshare Professional Functionality**, page 21, describes how to ensure that Workshare Professional functionality is fully enabled.

Launching Workshare Professional

Workshare Professional integrates within Microsoft Word, Excel and PowerPoint. To this end, there is no independently accessed user interface for Workshare Professional - the user interface is accessed from within Microsoft Word, Excel or PowerPoint and is available from all documents.

NOTE: The comparison functionality of Workshare DeltaView is also available as a standalone application. Refer to *Chapter 7: Comparing Documents Using Workshare DeltaView* for further details.

The Workshare Professional user interface adopts a task-oriented approach guiding you through each process one step at a time and providing clear explanations at each step. This provides a steady flow to your work with no need to move between interfaces or waste time deducing functionality.

After you have installed Workshare Professional, you see the following:

- In Microsoft Word, Excel and PowerPoint, the Workshare Panel displayed down the left side of the window. Refer to Workshare Panel, page 17.
- In Microsoft Word, Excel and PowerPoint, Workshare buttons are added to the Standard toolbar. Refer to Workshare Toolbar Buttons, page 19.
- In Microsoft Word, the Workshare menu is added to the menu bar. Refer to Workshare Menu, page 15.
- In Microsoft Word, the **Workshare Send for Review** option is added to the Microsoft Word *File* menu. This provides access to the send for review functionality of Workshare Professional, described in *Chapter 3: Sending Documents for Review*.

The addition of Workshare Professional does not affect the standard functionality of Microsoft Word, Excel or PowerPoint. You can operate these applications as usual and access the Workshare Professional functionality as required.

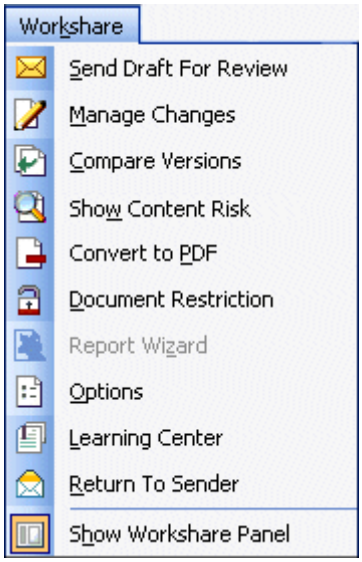
Workshare Professional functionality can also be accessed in the following ways:

- Double-click the **Workshare DeltaView** icon on the desktop.

- Select **Workshare DeltaView** from Programs Files in the Start Menu.
- Right-click on closed documents and select **Compare with Workshare** or **Convert to PDF with Workshare**.
- Click the **Compare Attachment with Workshare** button when you receive an email that contains an attachment.

WORKSHARE MENU

Whenever you open a document in Microsoft Word, the *Workshare* menu is included in the menu bar.



The *Workshare* menu includes the following options:

NOTE: All of these menu items are configurable. It is also possible to replace the Workshare menu with a toolbar. This can be configured from the **Administration** category in the Workshare Configuration Manager. The Workshare Configuration Manager is described in the *Workshare Professional Administration Guide*.

Menu Item	Toolbar Button (Optional)	Description
Send Draft For Review		Enables you to send a draft of the document by email to other people enabling them to make comments and changes to the draft. Refer to *Chapter 3: Sending Documents for Review* for further information. Additionally, you can access this functionality by selecting **Workshare Send for Review** from the *File* menu in Microsoft Word.
Manage Changes		Enables you to import responses and review the changes that have been proposed to a document, accepting or rejecting them as required. Refer to *Chapter 5: Managing Responses* for further information.

Menu Item	Toolbar Button (Optional)	Description
Compare Versions		Enables you to compare a document with a previous version of the same document or with another document. Refer to *Chapter 6: Comparing Documents from within Microsoft Word* and *Chapter 7: Comparing Documents Using Workshare DeltaView* for further information.
Show Content Risk		Enables you to display a report of all the content risk in a document as well as remove selected hidden data from the document. Refer to *Chapter 8: Managing Content Risk in Documents* for further information.
Convert to PDF		Enables you to convert documents to PDF. Refer to *Chapter 11: Converting to PDF* for further information.
Document Restriction		Enables you to control your documents by setting restrictions on whether or not they can be emailed. Refer to *Chapter 10: Controlling Documents* for further information.
Report Wizard		Enables you to produce several different types of report. For example, a Document Audit Report, which includes information about the review cycle of the document or a Risk Report, which provides a full account of the different types of content risk in a document. Refer to *Chapter 12: Creating Reports* for further information.
Options		Enables you to configure system parameters in the Workshare Configuration Manager. Refer to the *Workshare Professional Administration Guide* for further information.
Learning Center		Provides access to the Learning Center on the Workshare Website where you can access useful information to help you learn about Workshare Professional. The Learning Center is also available from the Options page of the Workshare Panel. (Select **Options** from the *Workshare* menu to display the Options page in the Workshare Panel.)
Return To Sender		Enables a reviewer to return a document to you after adding their comments. This option is only enabled when a reviewer opens a document that has been sent to them for review. Refer to *Chapter 4: Receiving Files for Review* for further information.
Show Workshare Panel		Displays/hides the Workshare Panel down the left side of the Microsoft Word window. The Workshare Panel is displayed with its Home page open. Refer to *Workshare Panel*, below.

WORKSHARE PANEL

The Workshare Panel, displayed automatically down the left side of the Microsoft Word, Excel and PowerPoint windows, provides access to Workshare Professional functionality.

You can display/hide the Workshare Panel in any of the following ways:

- Select **Show Workshare Panel** from the *Workshare* menu. (Microsoft Word only)
- Click the **Show Workshare Panel** button in the **Standard** Microsoft Word, Excel or PowerPoint toolbar.

The Workshare Panel is your guide, prompting you through each step of any given process.

The content of the Workshare Panel varies according to the application and the functionality selected.

Microsoft Word

In Microsoft Word, the Home page of the Workshare Panel, shown below, provides quick access to the functionality of Workshare Professional, as follows:

NOTE: All of these options are configurable. You can configure whether each individual option is available from the **Administration** category in the Workshare Configuration Manager. The Workshare Configuration Manager is described in the *Workshare Professional Administration Guide*.

Send: Enables you to send a draft of the document by email to other people enabling them to make comments and changes to the draft. Refer to *Chapter 3: Sending Documents for Review* for further information.

NOTE: Additionally, you can access this functionality by selecting **Workshare Send for Review** from the *File* menu in Microsoft Word.

Manage Changes: Enables you to import responses and review the changes that have been proposed to a document, accepting or rejecting them as required. Refer to *Chapter 5: Managing Responses* for further information.

Compare: Enables you to compare a document with a previous version of the same document or with another document. Refer to *Chapter 6: Comparing Documents from within Microsoft Word* and *Chapter 7: Comparing Documents Using Workshare DeltaView* for further information.

Content Risk: Enables you to display a report of all the content risk in a document as well as remove selected content risk from the document. Refer to *Chapter 8: Managing Content Risk in Documents* for further information.

Restriction: Enables you to control your documents by setting restrictions on whether or not they can be emailed. Refer to *Chapter 10: Controlling Documents* for further information.

Convert to PDF: Enables you to convert a document to PDF. Refer to *Chapter 11: Converting to PDF* for further information.

There is a help link Help displayed at the top of every page in the Workshare Panel that provides access to online help as well as a close ☒ button that enables you to close/hide the Workshare Panel. Additionally, at the top of all pages of the Workshare Panel except the Home page, the following links are displayed:

Back: Return to the previously displayed page of the Workshare Panel.
Home: Return to the Home page of the Workshare Panel.

Microsoft Excel and PowerPoint

In Microsoft Excel and PowerPoint, the Workshare Panel, shown below, provides quick access to the functionality of Workshare Professional, as follows:

Content Risk: Enables you to display a report of all the content risk in a document. Refer to *Chapter 8: Managing Content Risk in Documents* for further information.

Convert to PDF: Enables you to convert a document to PDF. Refer to *Chapter 11: Converting to PDF* for further information.

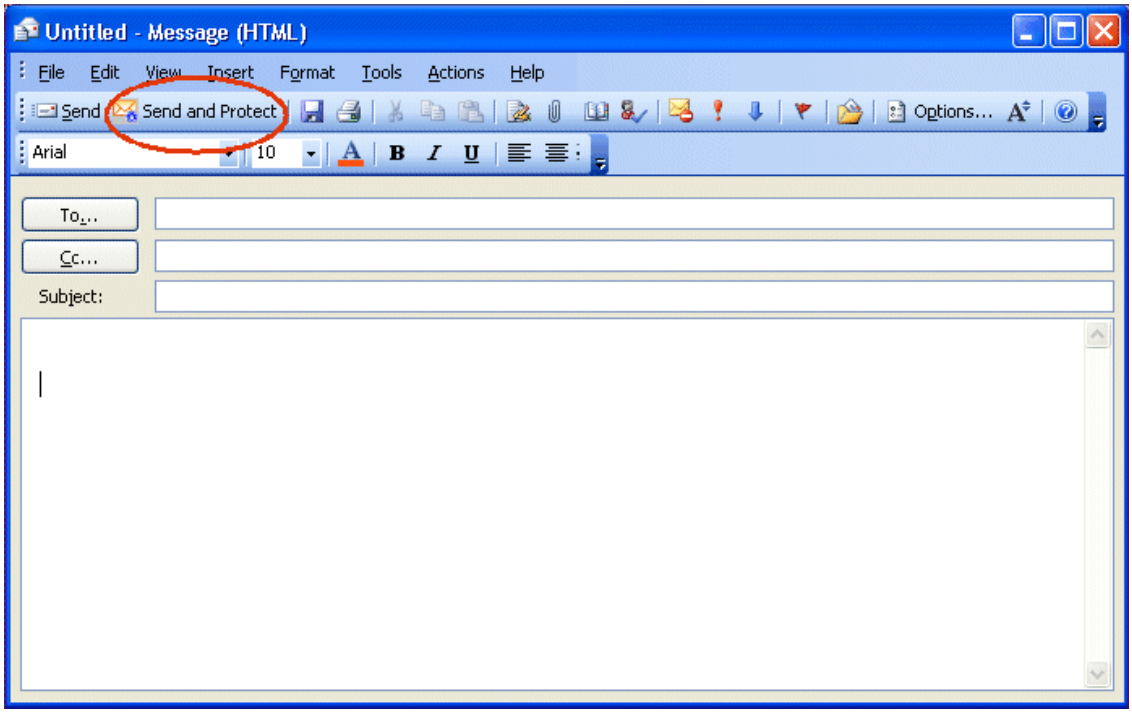
Restriction: Enables you to control your documents by setting restrictions on whether or not they can be emailed. Refer to *Chapter 10: Controlling Documents* for further information.

Workshare Toolbar Buttons

When Workshare Professional is installed, the following buttons are added to the Standard toolbar in Microsoft Word, Excel and PowerPoint:

	Toggle Workshare Panel	Displays/hides the Workshare Panel.
	Convert to PDF	Enables you to convert a document to PDF.
	Convert to PDF and Email	Enables you to convert a document to PDF and adds the PDF as an attachment to an email.

In Microsoft Outlook, the **Send with Protect** button is added to the Standard toolbar in the message window enabling you to discover content risk in email attachments as you send them.



NOTE: In order for this button to be available, the **Show Send with Protect button in mail messages** parameter (**Email Settings** category) must be selected in the Workshare Configuration Manager.

WORKSHARE DOCUMENT ALERT

Workshare Professional displays a Document Alerts icon on your computer's system tray (situated on the bottom right of your computer screen). This tool will scan the active document on your computer and alert you to hidden risks and content policy violations.

Document Alerts will detect the level of content risk and change color depending on the risk category:

Icon	State	Description
	High Level Content Risk	The active document contains high levels of content risk
	Medium Level Content Risk	The active document contains medium levels of content risk
	Low Level Content Risk	The active document contains low levels of content risk
	Standby	Document Alerts is currently on standby. Document Alerts does not detect an active Word document.

Document Alerts can also be configured to display a notification when a document's risk level changes to either medium or high. This is configured by right-clicking the Document Alerts icon and selecting **Show High Risk Alerts** or **Show Medium Risk Alerts** from the *Options* menu.

Document Alerts can check the level of risk of the active document every ten seconds by activating the **Active Monitoring** option from the right-click menu. If the active document changes its risk category level, Document Alerts will change color and display a notification (if activated). De-activating Active Monitoring enables Document Alerts to check the risk category level every time you open or save your document.

NOTE: Active Monitoring reports on the existence of hidden data risk only. Content policy violations are reported when you open or save your document or run a risk report.

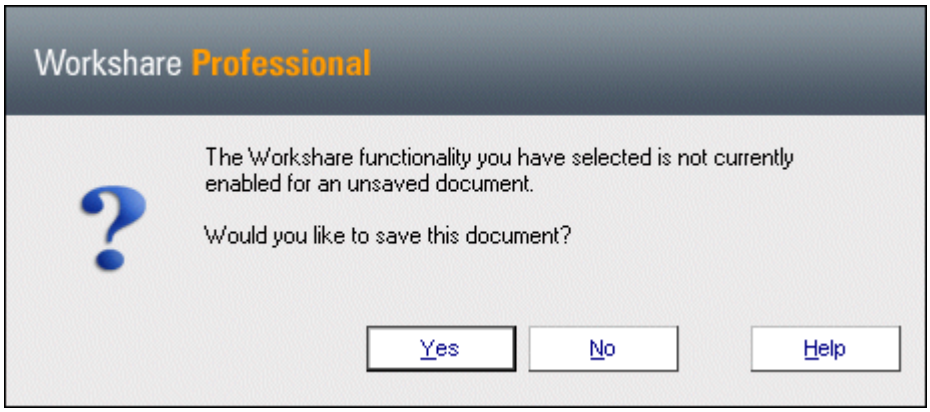
To view a risk report of the active document, double-click on the Document Alerts icon or right-click on the icon and select **Report on Active Document**. Refer to *Risk Report*, page 137 for more information about the contents of a risk report. You can also run risk reports on content risk for Excel and PowerPoint documents by double-clicking the Document Alerts icon.

Enabling Workshare Professional Functionality

To ensure Workshare Professional functionality is *fully* enabled, you should work with saved documents and on the latest version of a document.

Saved Documents

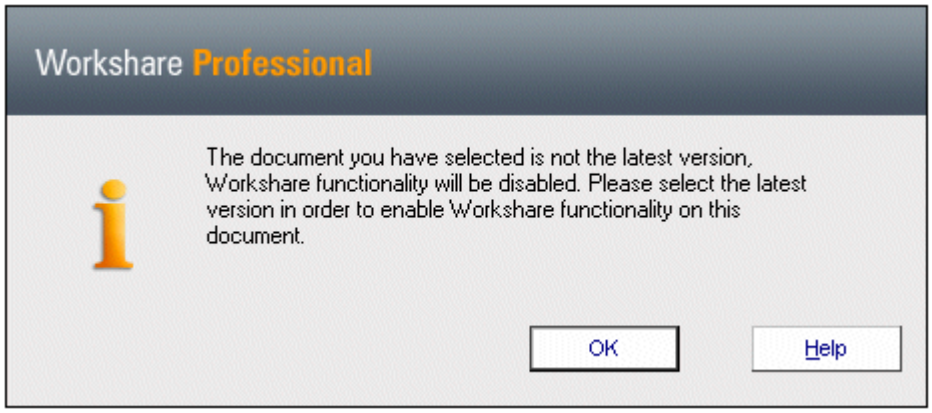
You must be working on a *saved* Microsoft Word document in order for the Workshare Professional functionality to be enabled. For example, if you open a document directly from an email attachment, it is only a temporary document and so Workshare Professional functionality is not enabled. If you click a Workshare Professional option (via the *Workshare* menu or the Workshare Panel), the following message is displayed:


Workshare Professional
The Workshare functionality you have selected is not currently enabled for an unsaved document.
Would you like to save this document?
Yes
No
Help

Latest Versions

When you are working on a document in your DMS that is not the latest version, only the compare functionality is available. When you click **Compare** in the Workshare Panel (or **Compare Versions** from the *Workshare menu*), you can compare the document with another version or with another document, as described in *Chapter 6: Comparing Documents from within Microsoft Word* and *Chapter 7: Comparing Documents Using Workshare DeltaView*.

When you click **Send**, **Manage Changes**, **Content Risk** or **Restriction** in the Workshare Panel (or the respective options in the *Workshare menu*), the following message is displayed:


Workshare Professional
The document you have selected is not the latest version, Workshare functionality will be disabled. Please select the latest version in order to enable Workshare functionality on this document.
OK
Help

Chapter 3: Sending Documents for Review

This chapter describes how to send a Microsoft Word document to other people for review. It includes the following sections:

- **Overview**, below, introduces the "send for review" functionality of Workshare Professional.
- **Sending Documents for Review**, page 24, describes how to send documents for review, including how to compare documents before sending, how to clean hidden data from documents before sending and how to send multiple documents.

OVERVIEW

Workshare Professional enables multi-user input to a single document, facilitating both the formal review process as well as simple document exchange.

You can send any document to multiple recipients in order to receive their input to the document. The process is initiated from Microsoft Word so after working on your document, you simply send it out for review. The document is sent by email. SharePoint users can also upload their document to SharePoint and direct reviewers to its location.

When a document is sent for review, Workshare Professional tags the document. When the reviewer returns the document, Workshare Professional identifies the tag and recognizes the document as a response to the document you initially sent for review.

In addition, Workshare Professional provides the following useful functionality:

- You can send the document in PDF format. The recipient can then only view the document and cannot edit it in any way.
- You can compare the document before sending it (against an earlier version or against another document). You can then include the comparison when you send the document for review.
- You can clean sensitive hidden data from the document before sending it, for example track changes and comments. Such information may expose the history of the document, prior uses of the document or other proprietary information.

  NOTE: Administrator-defined hidden data (hidden data defined by your administrator in the Workshare Configuration Manager) is also cleaned from a document when it is sent for review. Refer to *Chapter 9: Protecting Email Attachments* for further information. This process also applies to documents uploaded to SharePoint through Workshare Professional.

- You can send additional documents, for example, appendices, with the original document. These documents will also be tagged by Workshare Professional.

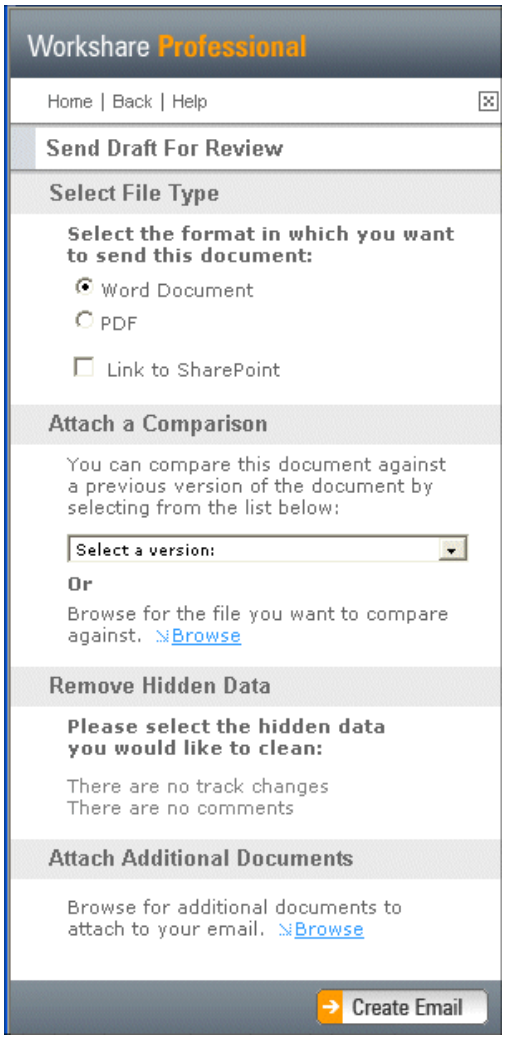
SENDING DOCUMENTS FOR REVIEW

You can send any document to multiple recipients for them to review. The process is initiated from Microsoft Word so after working on your document, you simply send it out for review. The document is sent by email in DOC or PDF format.

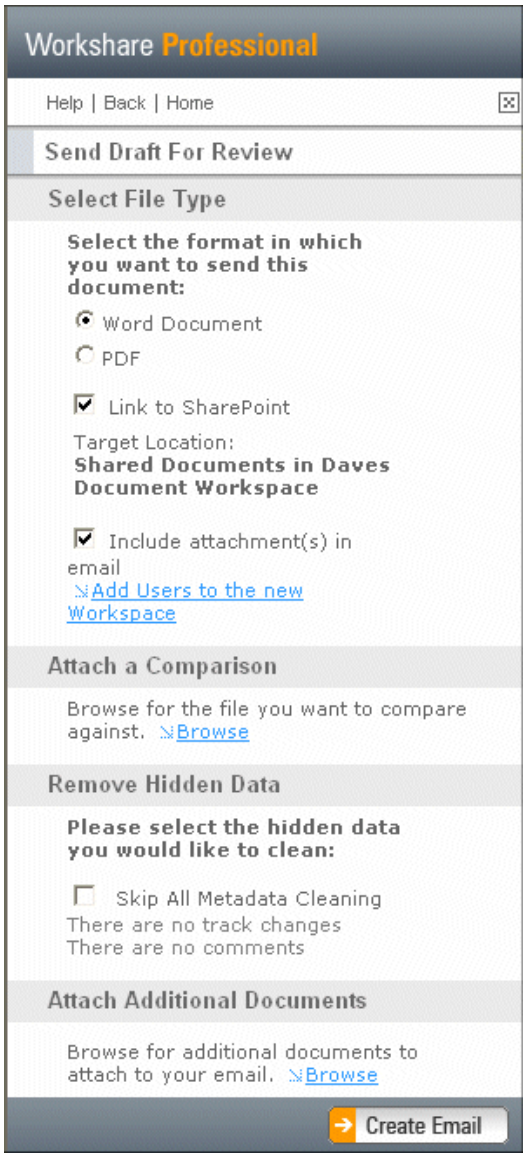
NOTE: You can also send an RTF document for review. In this situation, the RTF document is converted and sent in DOC format so the recipient receives a document with a .doc extension. The original document is not converted and remains as an RTF document. You can later import responses into the RTF document.

To send a document for review:

1. From the *Workshare menu*, select **Send Draft For Review** or click **Send** in the Home page of the Workshare Panel. The Send Draft for Review page is displayed as follows:


Workshare Professional
Home | Back | Help
Send Draft For Review
Select File Type
Select the format in which you want to send this document:
Word Document
PDF
Link to SharePoint
Attach a Comparison
You can compare this document against a previous version of the document by selecting from the list below:
Select a version:
Or
Browse for the file you want to compare against. Browse
Remove Hidden Data
Please select the hidden data you would like to clean:
There are no track changes
There are no comments
Attach Additional Documents
Browse for additional documents to attach to your email. Browse
Create Email

When not working with SharePoint

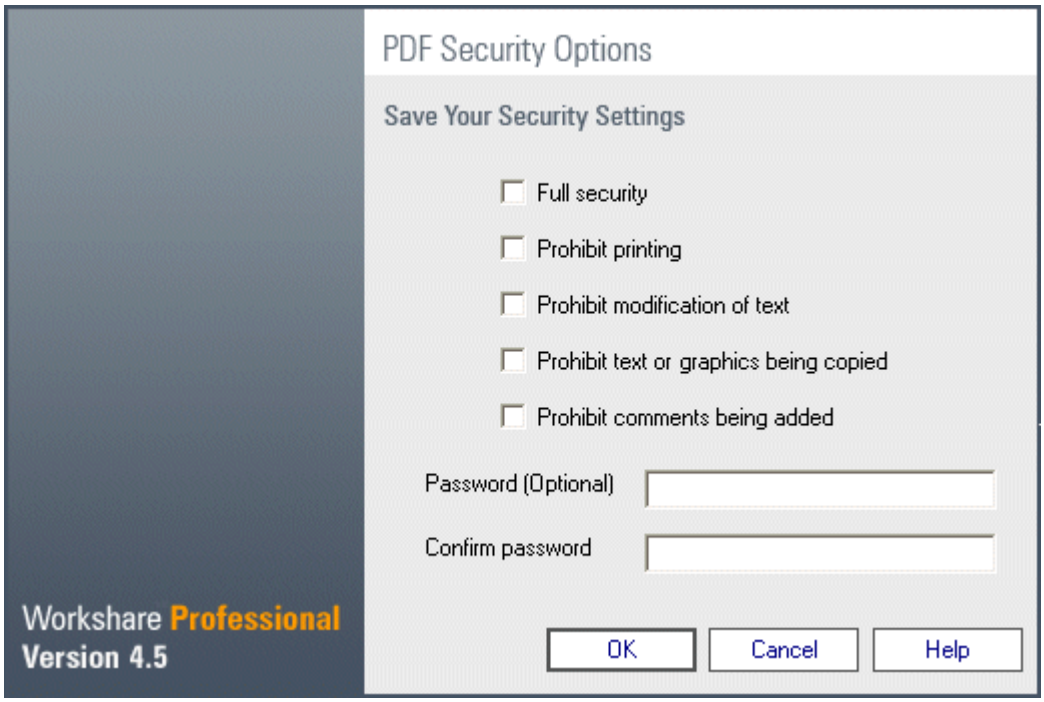

Workshare Professional
Help | Back | Home
Send Draft For Review
Select File Type
Select the format in which you want to send this document:
Word Document
PDF
Link to SharePoint
Target Location:
Shared Documents in Daves Document Workspace
Include attachment(s) in email
Add Users to the new Workspace
Attach a Comparison
Browse for the file you want to compare against. Browse
Remove Hidden Data
Please select the hidden data you would like to clean:
Skip All Metadata Cleaning
There are no track changes
There are no comments
Attach Additional Documents
Browse for additional documents to attach to your email. Browse
Create Email

When working with SharePoint

2. In the **Select File Type** area, select the format in which you want to send the document by selecting one of the following radio buttons:
   - **PDF**: The document will be sent as a PDF file. The recipient will be able to open and view it in Adobe Reader but will not be able to edit the document.
   - **Word Document**: The document will be sent as a Microsoft Word file (.doc) and the recipient will be able to edit it in Microsoft Word.

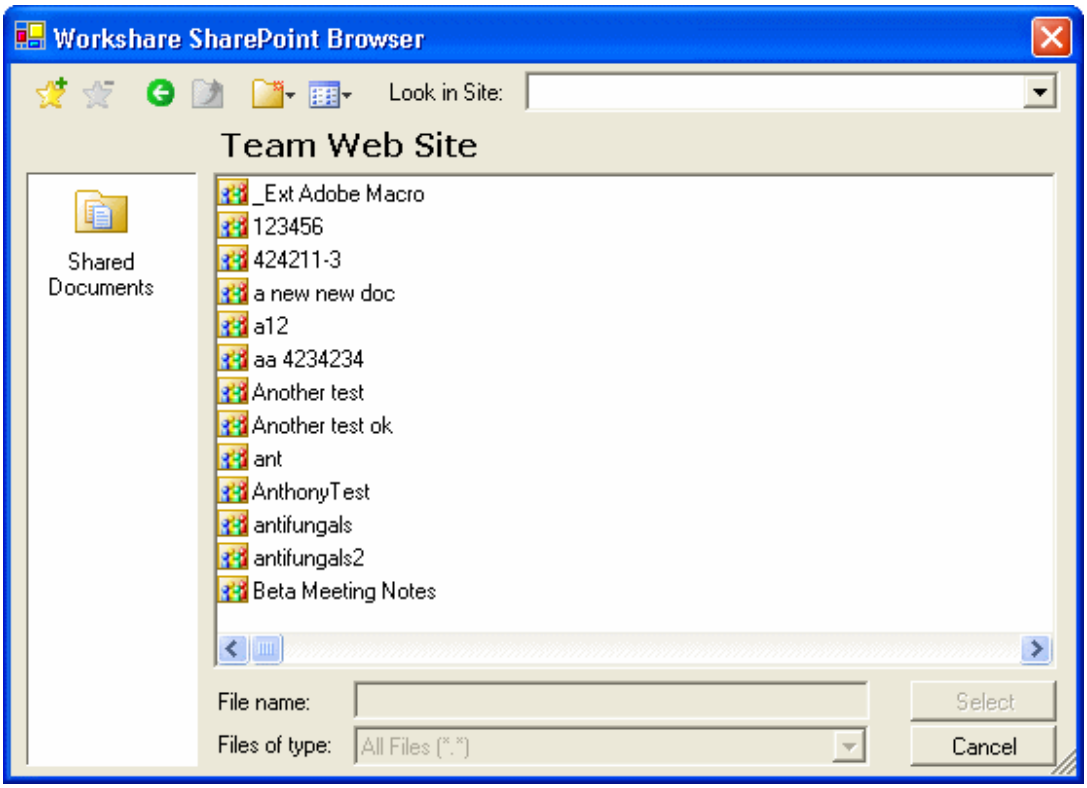
NOTE: If you do not have the Workshare PDF Publisher printer installed, Workshare Professional cannot convert the document to PDF. The document will be sent in Microsoft Word format (.doc). Please consult your system administrator for more information.

3. If you selected **PDF** in step 2, you can click the **PDF Security Options** link displayed in the **Select File Type** area to set PDF security options. The *PDF Security Options* dialog box is displayed.



4. Select one or more of the security options individually or select the **Full security** checkbox to select them all. The security options are as follows:
   - **Prohibit printing:** Prevents recipients from printing the PDF document.
   - **Prohibit modification of text:** Prevents recipients with Adobe Acrobat from editing the PDF document.
   - **Prohibit text/graphics being copied:** Prevents recipients from copying graphics or text directly from the PDF document.
   - **Prohibit comments being added:** Prevents recipients with Adobe Acrobat from adding comments to the PDF document.
5. If required, set a password to protect these security settings. Recipients will need to enter this password in order to change these settings.
6. Click **OK**.

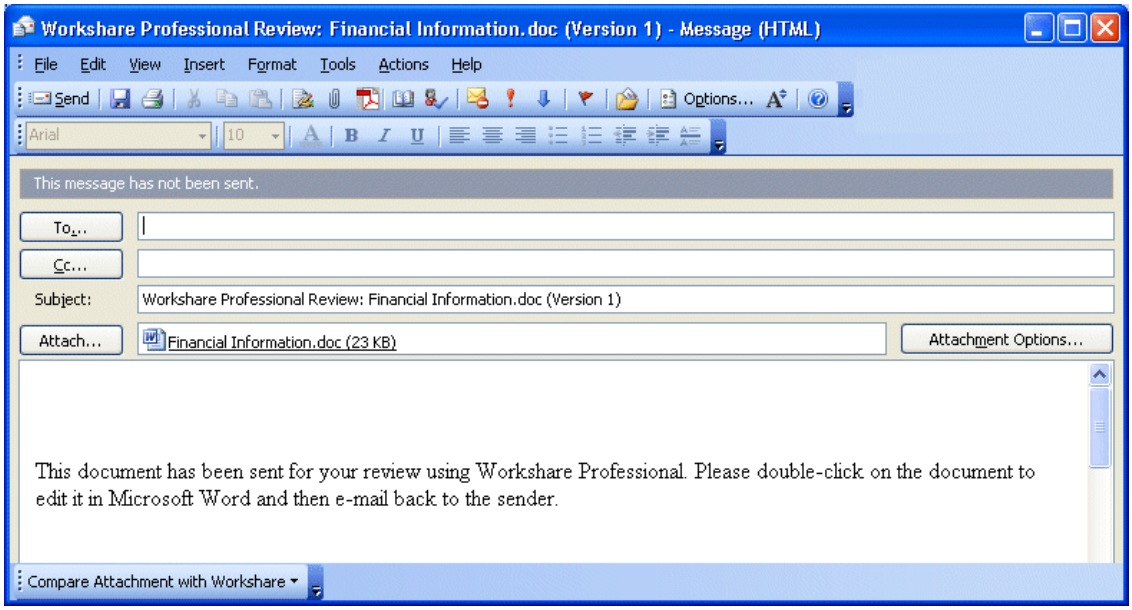
7. If you are working with SharePoint, select the **Link to SharePoint** checkbox to link to a document workspace within a Windows SharePoint site. Select the SharePoint site location from the Browser dialog box.



8. If you are working with an Interwoven 8 DMS, the **Select Email Settings** area is displayed below the **Select File Type** area. Refer to *Filing Emails in Interwoven 8*, page 34.
9. If you want to include a comparison with the document when sending it, you can specify the details in the **Attach a Comparison** area. Refer to *Comparing Documents Before Sending*, page 27.
10. If you want to clean hidden data from the document before sending it, select the type of hidden data to clean in the **Remove Hidden Data** area. Refer to *Cleaning Hidden Data Before Sending*, page 31.
11. If you want to send additional documents with the review documents, select the documents in the **Attach Additional Documents** area. Refer to *Sending Additional Documents*, page 32.
12. At the bottom of the Send Draft for Review page, click **Create Email**. An email is created and the selected actions performed. A progress dialog box indicates the progress of the activity. For example, when additional documents have been selected, each one is displayed by name as Workshare Professional deals with them.

NOTE: If you have made changes to the document and not saved, the document is saved.

An email message window is displayed with the original document (and any comparison or additional documents) as an attachment.


Workshare Professional Review: Financial Information.doc (Version 1) - Message (HTML)
File Edit View Insert Format Tools Actions Help
Send
Options...
Arial
10
This message has not been sent.
To...
Cc...
Subject:
Workshare Professional Review: Financial Information.doc (Version 1)
Attach...
Financial Information.doc (23 KB)
Attachment Options...
This document has been sent for your review using Workshare Professional. Please double-click on the document to edit it in Microsoft Word and then e-mail back to the sender.
Compare Attachment with Workshare

NOTES:

It may take a few moments for the email message window to be displayed.

If you work with the **From** field in your email application, Workshare Professional uses the information from the **From** field as the sender information (for return to sender purposes). This is useful if you are sending a document on someone else's behalf. The email might be from you but you can enter a different name in the **From** field as the sender. If you do not enter anything in the **From** field, Workshare Professional regards the sender of the email as the sender (for return to sender purposes).

If this window is not displayed, you may not have your email application set as the default mail program in Internet Explorer. In Internet Explorer, select **Internet Options** from the *Tools* menu. In the **Programs** tab, select your email program (**Microsoft Outlook**/**Lotus Notes/Groupwise**) from the **E-Mail** drop-down list.

13. Enter the recipient(s) name and any other text you want to include and click **Send**. The document is sent to the specified recipients.

NOTES:

The Home page of the Workshare Panel is redisplayed.

Depending on the configuration of Workshare Professional, an email protection dialog box may be displayed before the document is sent. Refer to *Chapter 9: Protecting Email Attachments* for further information.

Comparing Documents Before Sending

When sending a document for review, you may want to include a comparison with a previous version of the document or with another document. This can help the recipient to see the changes that you have made to the document.

To compare documents before sending:

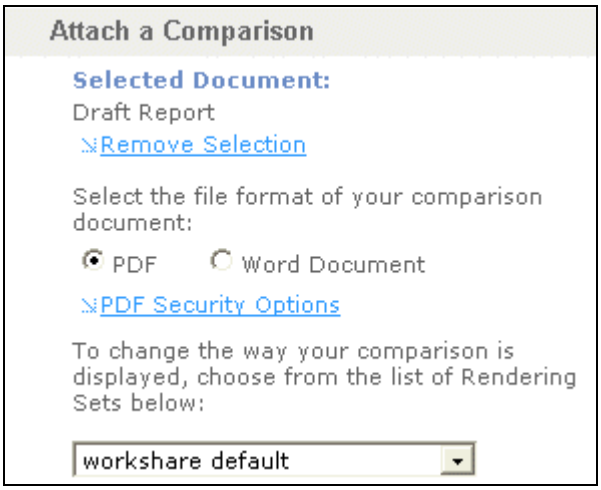
1. In the **Attach a Comparison** area of the Send Draft for Review page, select the document against which you want to compare the current document in one of the following ways:

- Select a version of the document from the drop-down list. When working with a DMS and the document has previous versions, the drop-down list is a list of other versions of the document. When not working with a DMS, the list is a list of previously sent out versions of the document. These "versions" are actually revisions, which are created when the document is sent for review if the document has changed since the last time it was sent.

NOTE: If you are working with a document not saved in your DMS, or that does not have previous versions, there may be a drop-down list of previous drafts of the same document that were sent for review.

- Click **Browse** and select a document from your DMS or locally.

The **Attach a Comparison** area is displayed as follows:

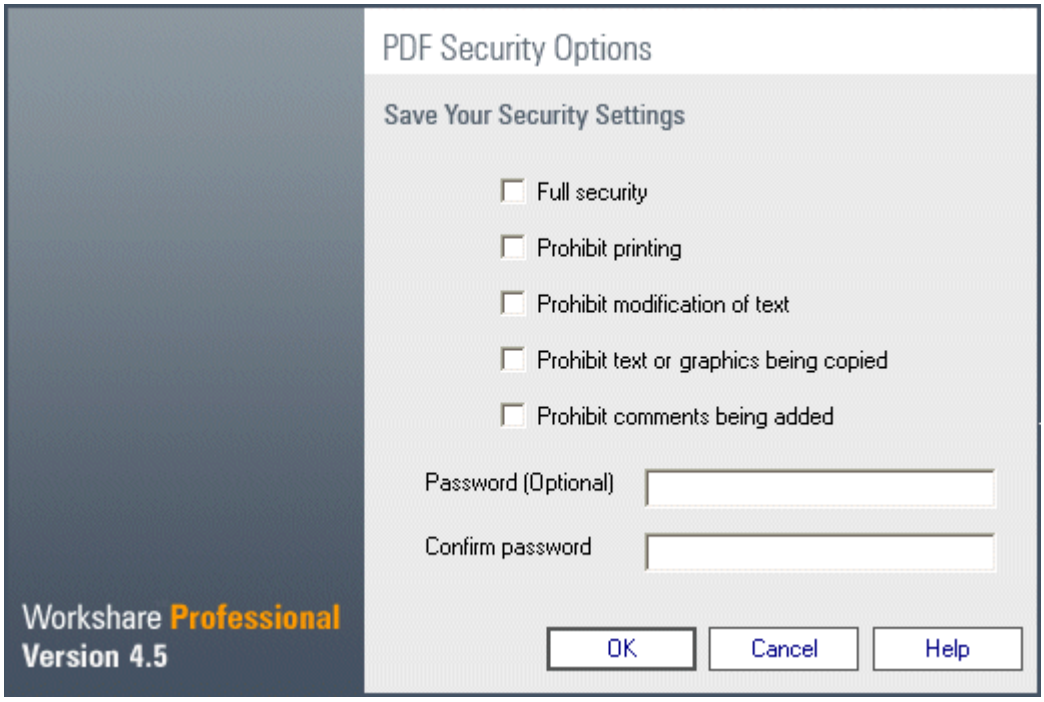

Attach a Comparison
Selected Document:
Draft Report
Remove Selection
Select the file format of your comparison document:
PDF
Word Document
PDF Security Options
To change the way your comparison is displayed, choose from the list of Rendering Sets below:
workshare default

2. Select the format in which you want to send the comparison from the following:
   - **PDF**: The comparison will be sent as a PDF file. This is the default selection.
   - **Word Document**: The comparison will be sent as a Microsoft Word file (.doc).

TIP! It is good practice to send a document for review in Microsoft Word format (.doc) and to include a comparison in PDF format. This way, the recipients clearly know which is the document to review and edit and which is the document for information purposes.

NOTE: If you do not have the Workshare PDF Publisher printer installed, Workshare Professional cannot convert the document to PDF. The document will be sent in Microsoft Word format (.doc). Refer to your system administrator.

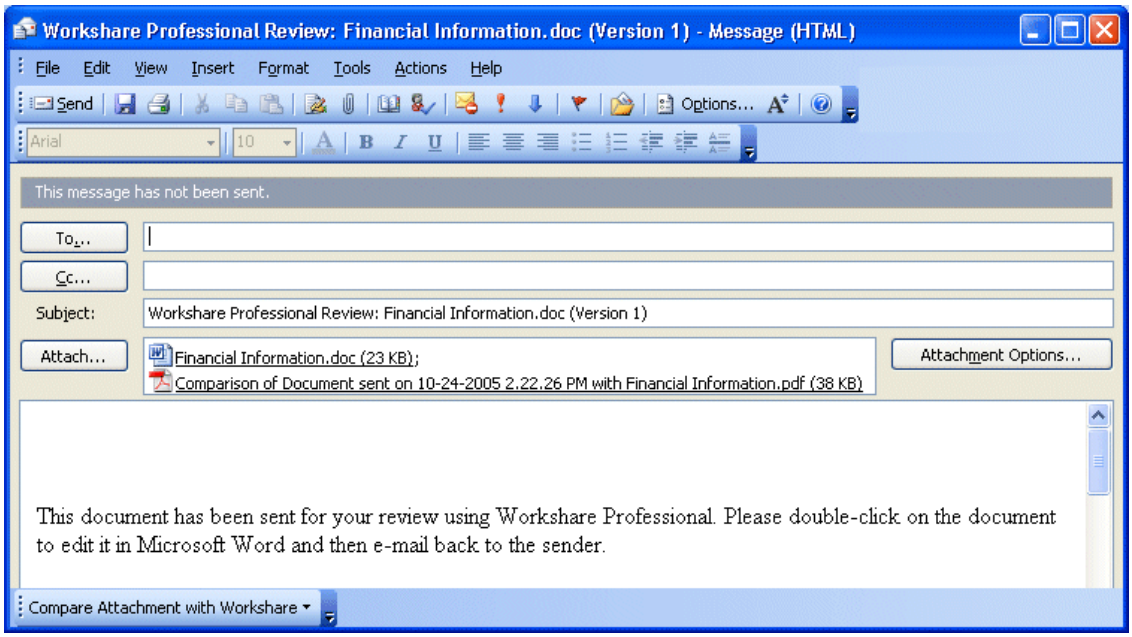
3. If you selected **PDF** in step 2, you can click the **PDF Security Options** link to set PDF security options. The *PDF Security Options* dialog box is displayed.



4. Select one or more of the security options individually or select the **Full security** checkbox to select them all. The security options are as follows:
   - **Prohibit printing:** Prevents recipients from printing the PDF document.
   - **Prohibit modification of text:** Prevents recipients with Adobe Acrobat from editing the PDF document.
   - **Prohibit text/graphics being copied:** Prevents recipients from copying graphics or text directly from the PDF document.
   - **Prohibit comments being added:** Prevents recipients with Adobe Acrobat from adding comments to the PDF document.
5. If required, set a password to protect these security settings. Recipients will need to enter this password in order to change these settings.
6. Click **OK**.
7. If required, select a rendering set from the drop-down list to determine how the comparison document is displayed. For example, deleted text could be shown in ~~red with a strikethrough~~. For further information about rendering sets, refer to *Appendix B: Configuring Rendering Sets*.

NOTE: The rendering set selected for the main document is also applied for any other comparisons sent with the main document.

8. Click **Create Email**. Workshare Professional performs the comparison. (A progress bar indicates the progress of the compare process.) When the comparison is complete, an email message window is displayed with the original document and the compared (Redline) document as attachments.


Workshare Professional Review: Financial Information.doc (Version 1) - Message (HTML)
File Edit View Insert Format Tools Actions Help
Send
Options...
Arial
10
This message has not been sent.
To...
Cc...
Subject:
Workshare Professional Review: Financial Information.doc (Version 1)
Attach...
Financial Information.doc (23 KB);
Comparison of Document sent on 10-24-2005 2.22.26 PM with Financial Information.pdf (38 KB)
Attachment Options...
This document has been sent for your review using Workshare Professional. Please double-click on the document to edit it in Microsoft Word and then e-mail back to the sender.
Compare Attachment with Workshare

NOTES:

It may take a few moments for the email message window to be displayed.

If you work with the **From** field in your email application, Workshare Professional uses the information from the **From** field as the sender information (for return to sender purposes). This is useful if you are sending a document on someone else's behalf. The email might be from you but you can enter a different name in the **From** field as the sender. If you do not enter anything in the **From** field, Workshare Professional regards the sender of the email as the sender (for return to sender purposes).

If this window is not displayed, you may not have your email application set as the default mail program in Internet Explorer. In Internet Explorer, select **Internet Options** from the *Tools* menu. In the **Programs** tab, select your email program (**Microsoft Outlook**/**Lotus Notes/Groupwise**) from the **E-Mail** drop-down list.

9. Enter the recipient(s) name and any other text you want to include and click **Send**. The file is sent to the specified recipients.

NOTES:

The Home page of the Workshare Panel is redisplayed.

Depending on the configuration of Workshare Professional, an email protection dialog box may be displayed before the document is sent. Refer to *Chapter 7: Protecting Email Attachments* for further information.

Cleaning Hidden Data Before Sending

When sending a document for review, you can select to remove track changes and comments from the sent document.

- **Track Changes**: May expose the history of the document, prior uses of the document or other proprietary information.
- **Comments**: May expose information about the drafting of the document that would be inappropriate to reveal to outside parties.

Workshare Professional also cleans administrator-defined hidden data from the sent document. For example, document properties, such as title, subject and author. Administrator-defined hidden data is always removed from a document when it is sent for review. Your administrator defines what hidden data is removed in the Workshare Configuration Manager. Refer to *Chapter 9: Protecting Email Attachments* for further information.

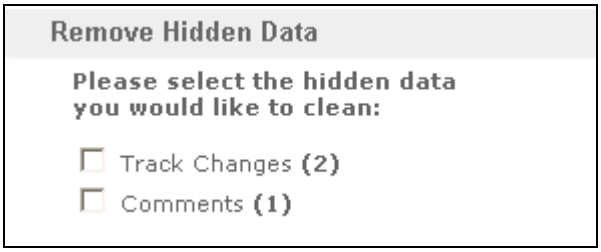
NOTES:

Track changes, comments and administrator-defined hidden data are removed from the sent document only and not from the original document.

Hidden data cleaning does not remove comments from a comparison document. Special care should be taken when attaching a comparison document to the email. If at least one of the compared documents (the original or the modified) contains comments, the comments will be included in the comparison (Redline) document. It is strongly recommended not to attach a comparison that contains sensitive comments when sending documents for review.

To clean hidden data from a document before sending:

1. In the **Remove Hidden Data** area of the Send Draft for Review page, select the type of hidden data you want removing by selecting the checkboxes to the left of **Track Changes** and/or **Comments**



For your information, you can also see the number of footnotes in the document. This information is only displayed when the **Handle Footnotes as hidden data** parameter (**Administration** category) in the Workshare Configuration Manager is selected. The Workshare Configuration Manager is described in the *Workshare Professional Administration Guide*.

NOTES:

The number in parentheses indicates the number of instances of track changes, comments and footnotes in the document.

Workshare Professional can be configured so that the **Track Changes** and **Comments** checkboxes are selected by default. Select the **Clean track changes by default** and **Clean comments by default** parameters in the **Email Settings** category of the Workshare Configuration Manager. Refer to the *Workshare Professional Administration Guide* for further information.

2. Click **Create Email**. The selected items are cleaned from the sent document and an email message window is displayed with the cleaned document as an attachment. If required, you can open the attachment and see that the hidden data has been removed.

NOTES:

It may take a few moments for the email message window to be displayed.

If you work with the **From** field in your email application, Workshare Professional uses the information from the **From** field as the sender information (for return to sender purposes). This is useful if you are sending a document on someone else's behalf. The email might be from you but you can enter a different name in the **From** field as the sender. If you do not enter anything in a **From** field, Workshare Professional regards the sender of the email as the sender (for return to sender purposes).

If this window is not displayed, you may not have your email application set as the default mail program in Internet Explorer. In Internet Explorer, select **Internet Options** from the *Tools* menu. In the **Programs** tab, select your email program (**Microsoft Outlook** or **Lotus Notes**) from the **E-Mail** drop-down list.

3. Enter the recipient(s) name and any other text you want to include and click **Send**. Administrator-defined hidden data is removed (according to the settings specified by your administrator in the Workshare Configuration Manager) and the file is sent to the specified recipients.

NOTES:

The Home page of the Workshare Panel is redisplayed.

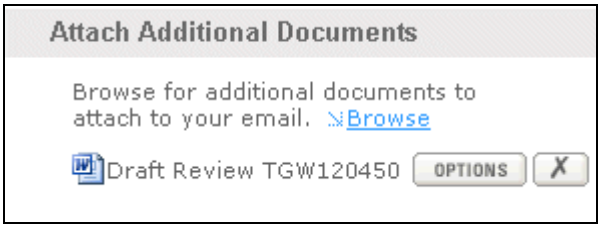
Depending on the configuration of Workshare Professional, an email protection dialog box may be displayed before the document is sent. Refer to *Chapter 9: Protecting Email Attachments* for further information.

Sending Additional Documents

Workshare Professional enables you to send multiple documents for review at the same time. The additional documents may be related to the original document, for example, appendices, or they might be unrelated.

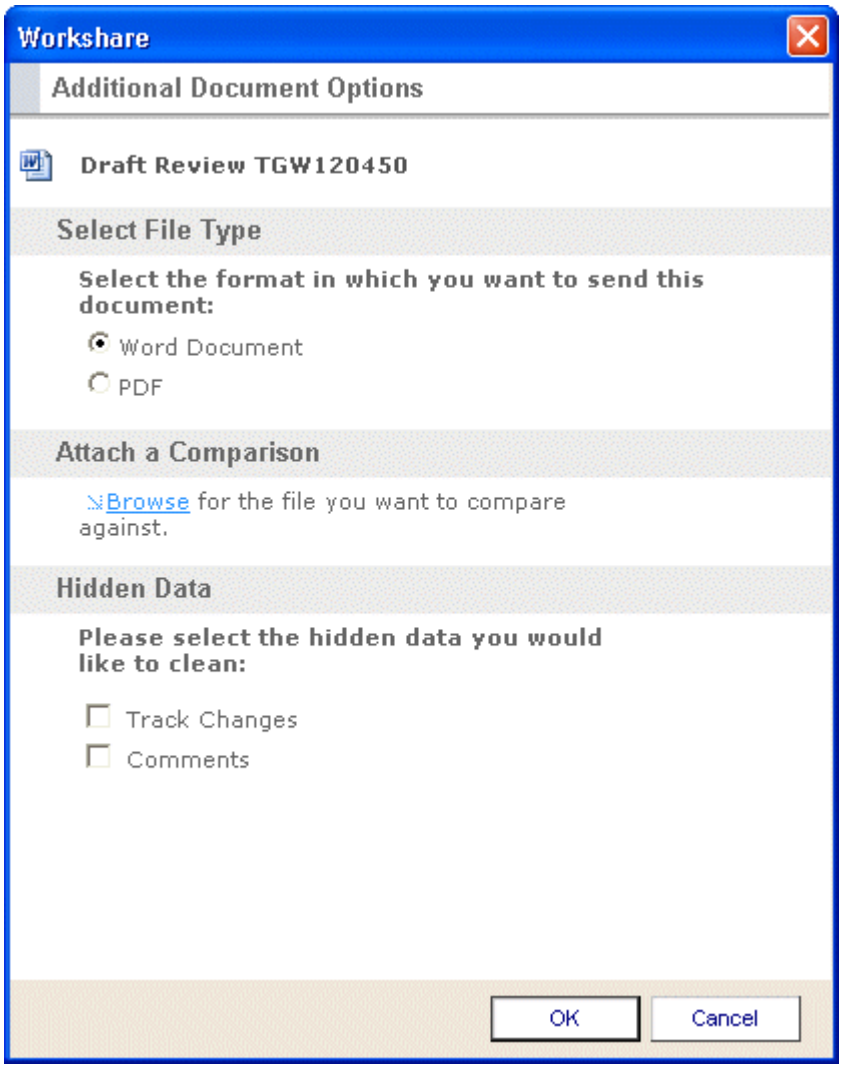
To send additional documents:

1. In the **Attach Additional Documents** area of the Send Draft for Review page, click **Browse** and select an additional document from your DMS or locally. The selected document is listed in the **Attach Additional Documents** area as follows:



NOTE: To delete a document so that it is not sent for review, click ✗ to the far right of the document in the **Attach Additional Documents** area.

2. When you attach additional Microsoft Word documents, Workshare Professional treats these documents as sent for review and displays an **Options** button next to each document. Click this **Options** button to convert to PDF, attach a comparison and clean hidden data. The *Additional Document Options* dialog box is displayed.



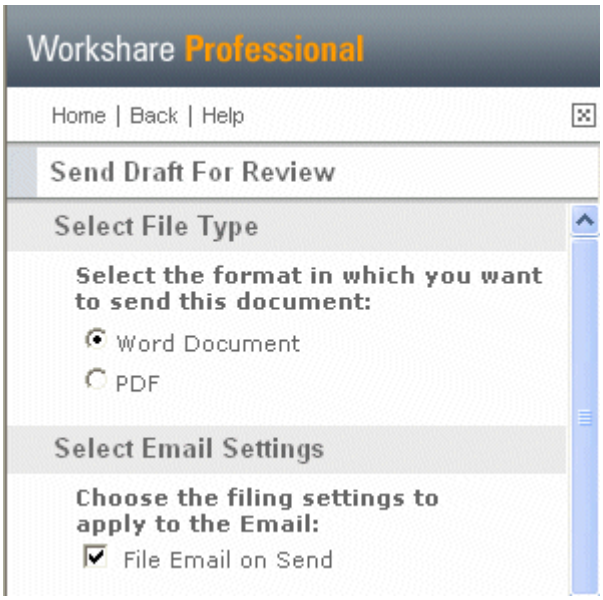
3. Use the procedures described in steps 2 to 7 (page 25) to specify the format of the additional document as well as whether to include a comparison with it and whether to remove hidden data from it.
4. Click **OK**.
5. Repeat steps 1 to 4 above to add further documents to the list of documents in the **Attach Additional Documents** area. All the selected documents will be sent for review with the original document.

Filing Emails in Interwoven 8

When working with an Interwoven 8 DMS, Workshare Professional can automatically file the email generated when sending a document for review in the appropriate Matter workspace. In order for this functionality to be available, you must have selected the **Allow email filing options** checkbox in the *DMS Properties* dialog box (accessible from the Workshare Configuration Manager, **Document Management** category). The Workshare Configuration Manager is described in the *Workshare Professional Administration Guide*.

To file emails:

In the **Filing Emails** area of the Send Draft for Review page, select the **File Email on Send** checkbox:


Workshare Professional
Home | Back | Help
Send Draft For Review
Select File Type
Select the format in which you want to send this document:
Word Document
PDF
Select Email Settings
Choose the filing settings to apply to the Email:
File Email on Send

After clicking **Create Email**, an email is created and the **BCC** field in the email message window is populated with the email address of the email folder of the appropriate Matter workspace. Workshare determines the appropriate Matter workspace according to the Matter property of the document sent for review.

In order for this functionality to work correctly, ensure the following:

- Matter workspaces must have a Matter property.
- A Document folder within a Matter workspace must have an email address specified.
- The document being sent for review must have a Matter property.

Chapter 4: Receiving Files for Review

This chapter describes the options available when a document is received for review. It includes the following sections:

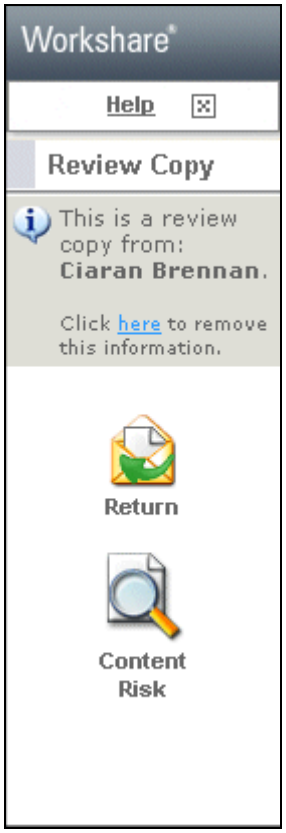
- **Overview**, below, introduces the review functionality of Workshare Professional.
- **Returning a Reviewed Document**, page 37, describes how to return a document after reviewing it.
- **Displaying Content Risk**, page 38, describes how to display a report of the content risk in a document.
- **Incorporating Changes**, page 38, describes how to view your proposed changes and also how to import your changes into the original document.
- **Removing the Review Copy Status**, page 40, describes how to remove the "Review Copy" status from the reviewed document so that it is no longer part of a Workshare Professional collaboration.
- **Comparing an Attachment**, page 40, describes how to compare an attachment with a file on your local file system or DMS.

Overview

When a document is received for review, it may be in DOC or PDF format. When the document is in PDF format, you can only view the document and cannot edit it in any way. When the document is in DOC format, you can open and edit the document using all standard Microsoft Word functionality.

When a reviewer does not have Workshare Professional installed, the document can be opened in Microsoft Word and changes made as required. The document can then be emailed back to the sender.

When a reviewer has Workshare Professional installed, the Workshare Panel (displayed down the left side of the Microsoft Word window) includes options to assist in the review and management of the document:



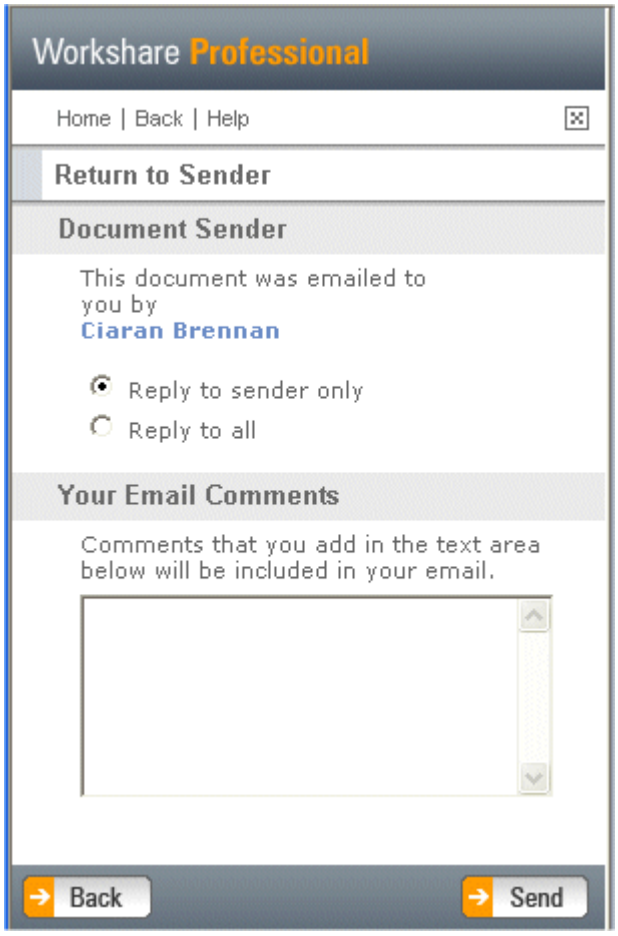
The document received for review is referred to as the "Review Copy". From here, you have several choices – to return the document to the sender with any changes, to produce a report of the content risk in the document, to incorporate the changes made into the original document or to remove the "Review Copy" status.

Returning a Reviewed Document

Once you have completed a review of the document and made all the required changes, you can return the document to the sender.

To return a reviewed document:

1. Click **Return**. The Return to Sender page is displayed in the Workshare Panel.


Workshare Professional
Home | Back | Help
Return to Sender
Document Sender
This document was emailed to you by
Ciaran Brennan
Reply to sender only
Reply to all
Your Email Comments
Comments that you add in the text area below will be included in your email.
Back
Send

2. Select whether to send the response to the sender only (**Reply to sender only**) or to all recipients of the initial email (**Reply to all**).
3. Click **Send**. An email message window is displayed with the sender's email details in the **To** field and the modified document as an attachment.
4. Click **Send** in the email message window to return the document to the sender.

Displaying Content Risk

You may want to display a report of the content risk in the document.

To display a content risk report:

Click **Content Risk**. The Content Risk page is displayed in the Workshare Panel. Refer to *Chapter 8: Managing Content Risk in Documents* for further information.

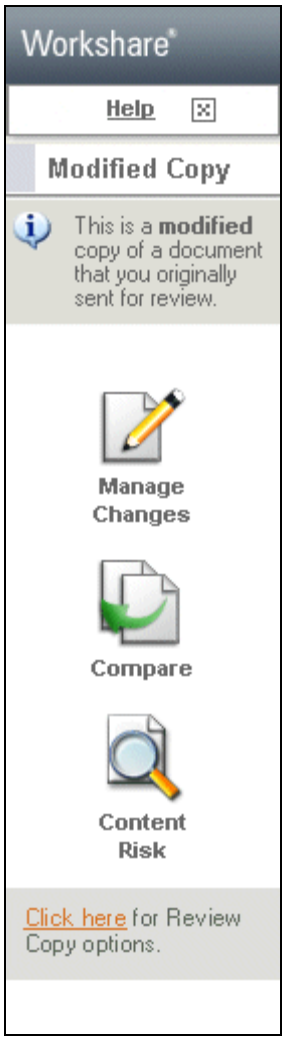
Incorporating Changes

You may want to incorporate the changes made to the document into the original document rather than sending back the reviewed document to the sender. You can do this using Workshare Professional as long as you have access to the original document.

To incorporate changes:

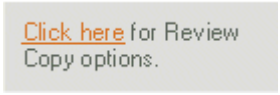
Click

. The Workshare Panel is displayed as follows:



The document is now referred to as the "Modified Copy" because it is a copy of the original document with your changes made to it.

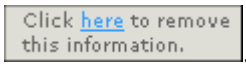
You can select to display the changes, which enables you to review the changes you made, or you can select to incorporate the changes, which enables you to then accept the changes into the original document. You can also produce a report of the content risk in the document. You can perform all of these steps or just one, or you can return to the "Review Copy" page.

Click…	In order to…
Manage Changes	Import your changes into the original or "Master" document. The latest version of the "Master" document is opened and the changes proposed by the "Modified Copy" are imported into the "Master" document and displayed. You can then select to incorporate the changes into the "Master" document as required. Refer to *Chapter 5: Managing Responses* for further details.
Compare	Compare the "Modified Copy" against the original or "Master" document using Workshare DeltaView. The comparison (Redline) document is displayed in the Workshare DeltaView window. Refer to *Chapter 7: Comparing Documents Using Workshare DeltaView* for further details.
Content Risk	Display a report of all the content risk in the document. Refer to *Chapter 8: Managing Content Risk in Documents* for further information.
	Return to the "Review Copy" page.

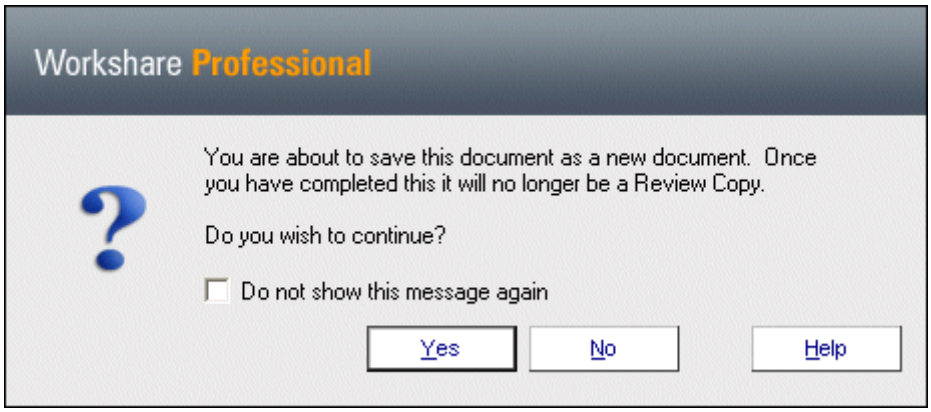
Removing the Review Copy Status

You may want to remove the "Review Copy" status from the reviewed document. In effect, you are saving the document as a new document and it is no longer part of a Workshare Professional collaboration. Workshare Professional removes the intelligent tag thus breaking the association between the document and the review cycle. You can open the document as a fresh document and all Workshare Professional functionality will be available from the Workshare Panel.

To remove the "Review Copy" status:

1. Click 

. The following message is displayed:


Workshare Professional
You are about to save this document as a new document. Once you have completed this it will no longer be a Review Copy.
Do you wish to continue?
Do not show this message again
Yes
No
Help

2. Click **Yes**. A standard Save As dialog box is displayed.
3. Specify the name and location of the new file and click **Save**.
4. Close your reviewed document.

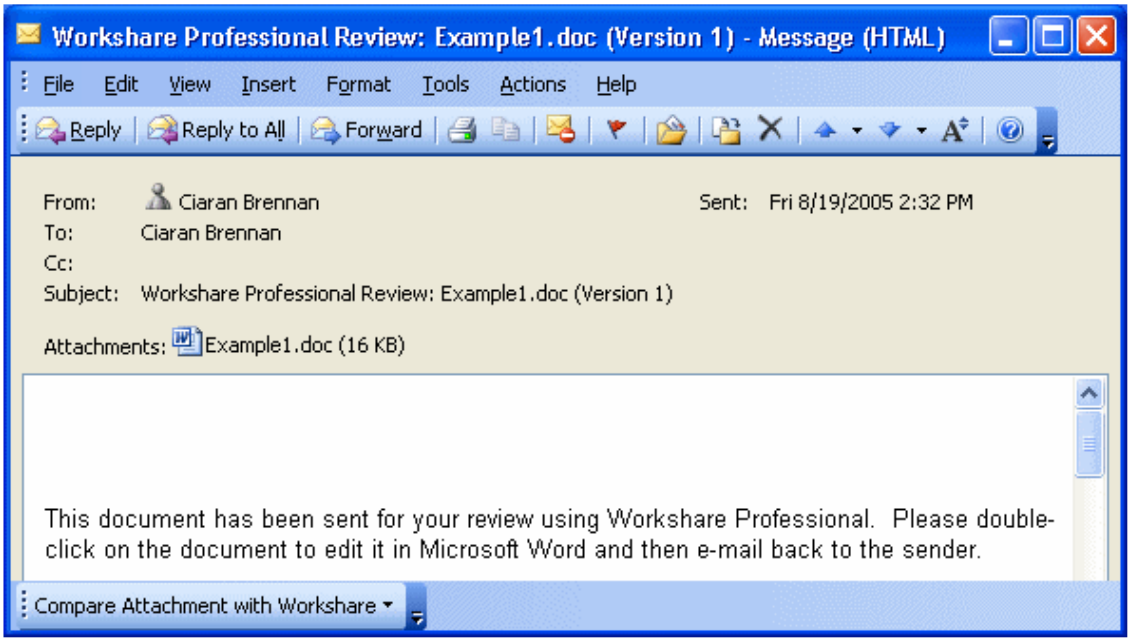
When you re-open the reviewed document, the Home page is displayed in the Workshare Panel. It is as if the document is a "Master" document with all Workshare Professional functionality available. For example, you can send the document for review, compare it with another document and so on.

Comparing an Attachment

When you receive an email with an attachment in DOC or PDF format, Workshare Professional enables you to compare the attachment with any document on your local file system or DMS. This feature can be used to compare the attached file with a previous version or another document on your computer.

To compare an attachment:

1. Click the **Compare Attachment with Workshare** button that appears at the bottom of the email.


Workshare Professional Review: Example1.doc (Version 1) - Message (HTML)
File Edit View Insert Format Tools Actions Help
Reply Reply to All Forward
From: Ciaran Brennan
Sent: Fri 8/19/2005 2:32 PM
To: Ciaran Brennan
Cc:
Subject: Workshare Professional Review: Example1.doc (Version 1)
Attachments: Example1.doc (16 KB)
This document has been sent for your review using Workshare Professional. Please double-click on the document to edit it in Microsoft Word and then e-mail back to the sender.
Compare Attachment with Workshare

2. The Document Selection dialog box is displayed. Select the files to compare as described in *Chapter 7: Comparing Documents Using Workshare DeltaView*.

Chapter 5: Managing Responses

This chapter describes how to import responses and manage the changes proposed by reviewers. It includes the following sections:

- **Overview**, below, describes how Workshare Professional recognizes response documents and introduces methods of importing. This section also describes how Workshare Professional works with files stored locally on your computer.
- **Importing Responses**, page 42, describes how to import response documents, using the automatic or the manual importing procedure.
- **Reviewing Responses**, page 49, describes how to view all the changes proposed to your document from all the reviewers.
- **Managing Changes**, page 59, describes how to work through the changes proposed by reviewers and handle them one by one. You can select to accept a change, reject it or mark it for future attention.

Overview

When a document is sent for review, Workshare Professional tags the document for identification purposes. When the reviewer returns the document, Workshare Professional identifies the tag and recognizes the document as a response to the document you initially sent for review. Therefore, when you receive a response email from a reviewer, you do not need to remember the location of the original document in the DMS or even its origin or purpose. You just open the attachment and Workshare Professional recognizes the document as a response. The response is imported into the original document, which is opened in Microsoft Word with the Workshare Panel displayed. Once a response document has been imported, you can review the changes proposed by the reviewer and apply or reject them as required. This is where Workshare Professional truly leverages the functionality of Microsoft Word, the DMS and the email application.

Importing Responses

In Workshare Professional, import means to associate a response with the original document so that the proposed changes can be reviewed and accepted into the original document if required.

Importing a response involves a comparison. When Workshare Professional recognizes a response, it compares the response document against the original document, creating a Redline document that presents the changes between the two documents.

When you receive a response from a reviewer by email, you may want to save the attached file and deal with it later or you may want to open the attached file immediately by double-clicking it within the email. Workshare Professional provides for both these scenarios using the following methods of importing:

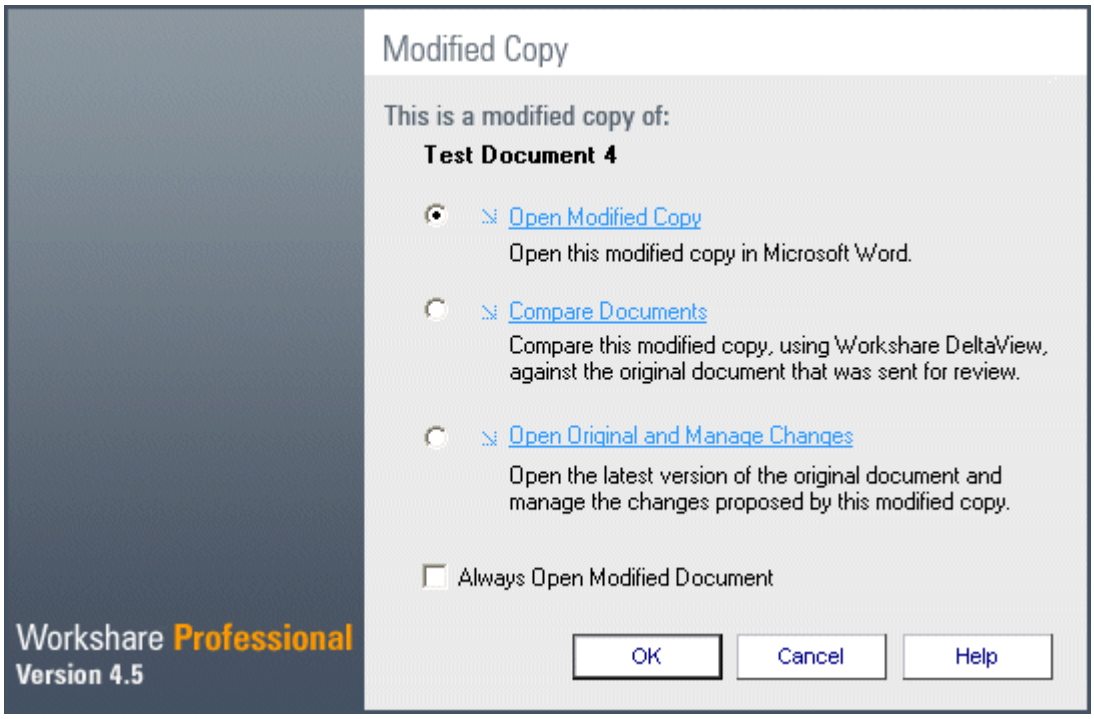
- **Automatic Importing**: When you first open a response document, you can select to add the document as a response to the original document. Automatic importing is described below.

- **Manual Importing**: If you do not import the response document immediately but save it to your DMS or locally, you can import it later using the manual import procedure. Manual importing is described on page 45.

Automatic Importing

The automatic import procedure is triggered simply by opening a response document attachment. Workshare Professional reads the tag in the document and recognizes that it is an amended version of a document that exists in your DMS.

When you open a response document returned by a reviewer as an email attachment, the *Modified Copy* dialog box is displayed:


Modified Copy
This is a modified copy of:
Test Document 4
Open Modified Copy
Open this modified copy in Microsoft Word.
Compare Documents
Compare this modified copy, using Workshare DeltaView, against the original document that was sent for review.
Open Original and Manage Changes
Open the latest version of the original document and manage the changes proposed by this modified copy.
Always Open Modified Document
OK
Cancel
Help
Workshare Professional
Version 4.5

NOTES:
This dialog box is only displayed if the **Show review options for incorporating response documents into collaborations** parameter in the Workshare Configuration Manager (Administration category) is selected.

If you are working with a document not saved in your DMS, or that does not have previous versions, there may be a drop-down list of previous drafts of the same document that were sent for review.

You can select to display the changes, which enables you to review the proposed changes, or you can select to incorporate the changes, which enables you to import the changes and then accept/reject the changes into the original document, or you can select to open the response document in Microsoft Word only. You can perform all of these steps or just one.

Click…	In order to…
Open Modified Copy	Open the response document in Microsoft Word. The response document is opened in Microsoft Word with a *Modified Copy* status (the Workshare Panel displays the "Modified Copy" page, see page 39). You can see the response document and then go on to

	Compare or **Manage Changes**. You can also return the document to *Review Copy* status (the Workshare Panel displays the "Review Copy" page, see page 36).
Compare Documents	Compare the response document against the original document using Workshare DeltaView. The comparison (Redline) document is displayed in the Workshare DeltaView window. Refer to *Chapter 7: Comparing Documents Using Workshare DeltaView* for further details.
Open Original and Manage Changes	Automatically import the changes into the original document. Workshare Professional performs a comparison between the response document and the version of the document that was sent for review and identifies all changes. Workshare Professional automatically recognizes the version of the response because of the tag inserted when the document was sent for review. When the import is complete, and the original document is open, the Manage Changes page is displayed in the Workshare Panel and you can now view the changes proposed in the response document and select to incorporate the changes into the original document as required. Refer to *Reviewing Responses*, page 49. If the original document is not open, it is first opened and the Manage Changes page is displayed in the Workshare Panel. **NOTE:** If Workshare Professional cannot open the original document (for example, it is open and locked by another user), the response is not imported. You can import the response manually. You can also open the response document in Microsoft Word.

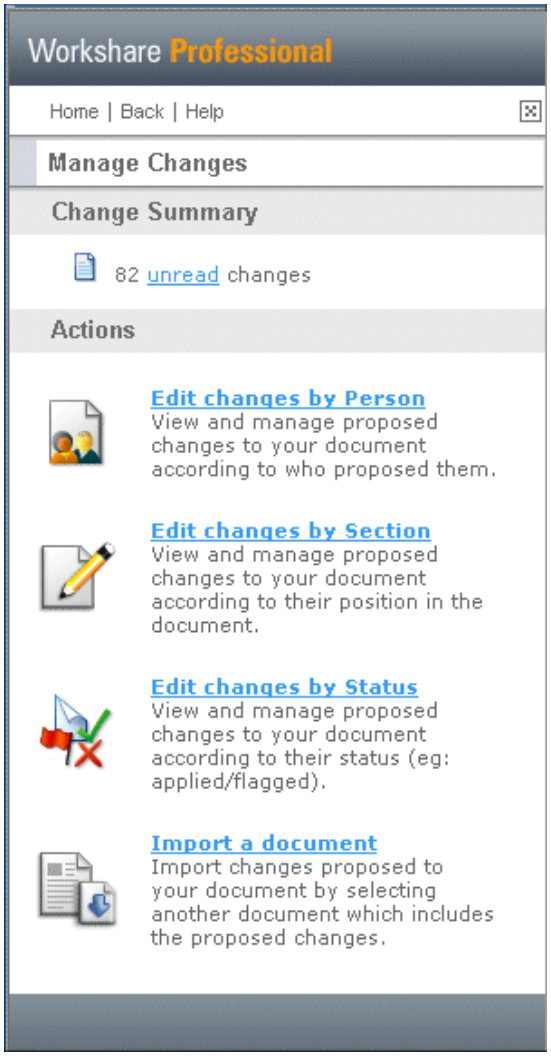
NOTE: The checkbox at the bottom of the *Modified Copy* dialog box changes according to your selection. For example, if you selected **Open Modified Copy**, the checkbox would say: **Always Open Modified Copy**. By selecting the checkbox, you ensure that future automatic imports of response documents are dealt with in the same way. For example, if you selected to Open Original and Manage Changes then next time you opened a response document, Workshare Professional would automatically import the changes without showing the *Modified Copy* dialog box.

Manual Importing

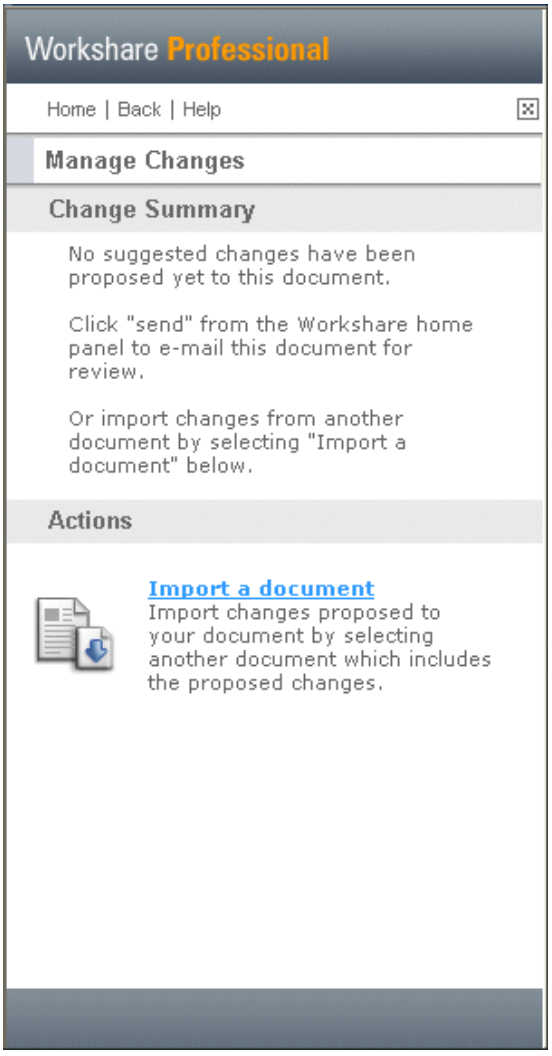
The manual import procedure can be used to import a response document that has been saved in your DMS or locally. For example, when you save an attachment rather than open it or when you save a response document to your DMS rather than importing it immediately.

To import a response manually:

1. With your original document open in Microsoft Word, select **Manage Changes** from the *Workshare menu*, or click **Manage Changes** in the Home page of the Workshare Panel. The Manage Changes page is displayed as follows:

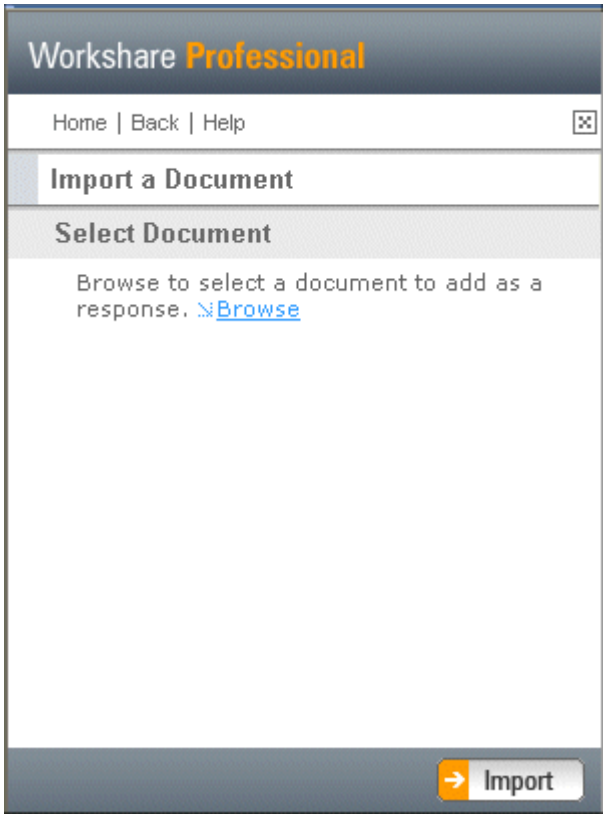

Workshare Professional
Home | Back | Help
Manage Changes
Change Summary
82 unread changes
Actions
Edit changes by Person
View and manage proposed changes to your document according to who proposed them.
Edit changes by Section
View and manage proposed changes to your document according to their position in the document.
Edit changes by Status
View and manage proposed changes to your document according to their status (eg: applied/flagged).
Import a document
Import changes proposed to your document by selecting another document which includes the proposed changes.

When other changes have already been imported into the document


Workshare Professional
Home | Back | Help
Manage Changes
Change Summary
No suggested changes have been proposed yet to this document.
Click "send" from the Workshare home panel to e-mail this document for review.
Or import changes from another document by selecting "Import a document" below.
Actions
Import a document
Import changes proposed to your document by selecting another document which includes the proposed changes.

When other changes have not yet been imported into the document

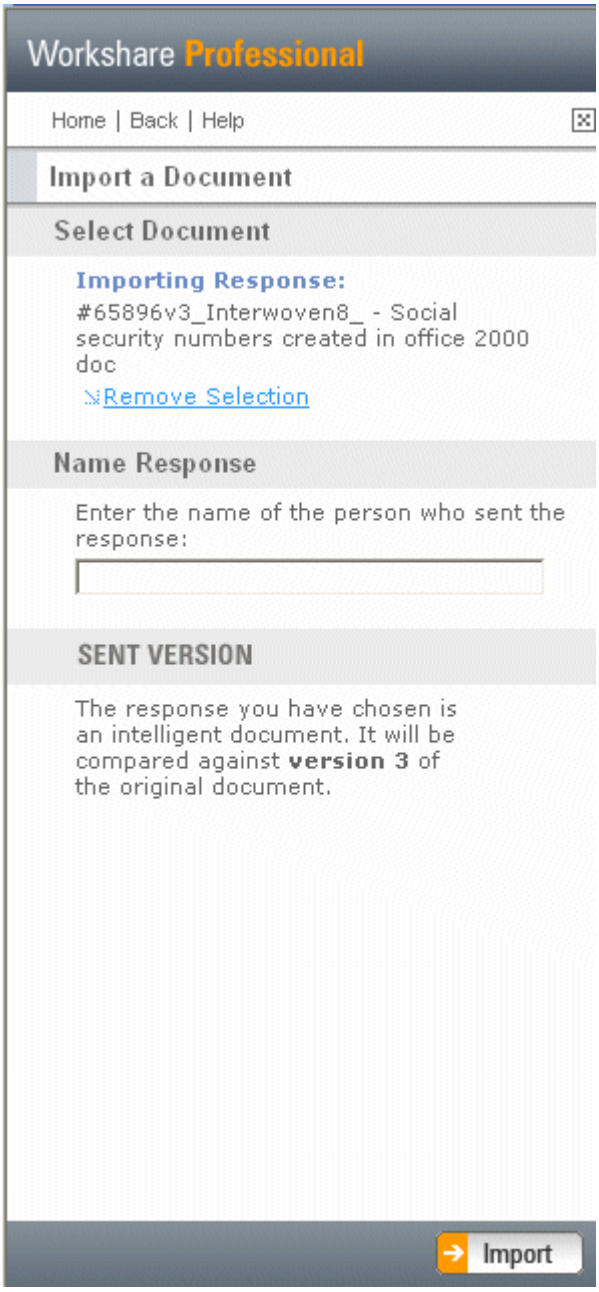
2. Select **Import a document**. The Import a Document page is displayed as follows:



3. Click **Browse** and select the response document that you want to import from your DMS or locally.

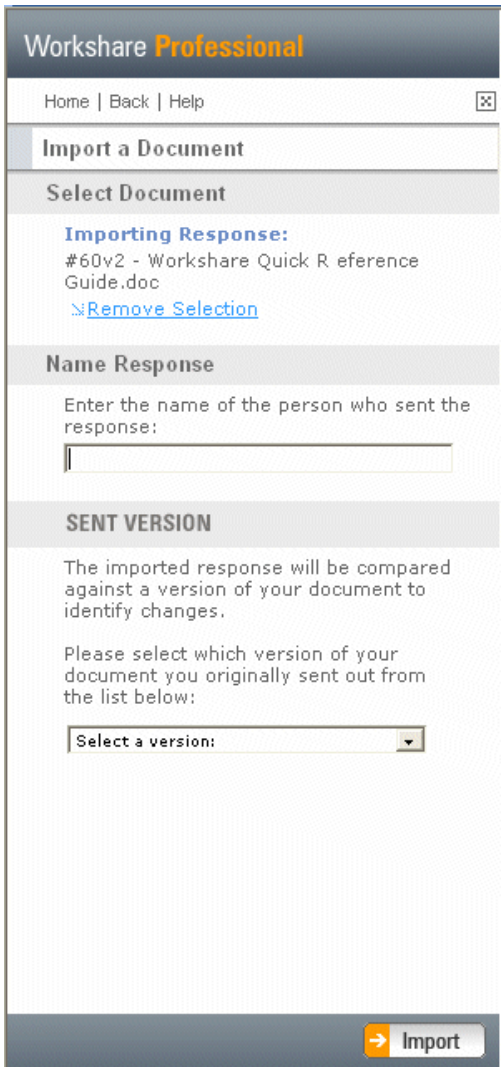
The Import a Document page is displayed in one of the following ways:

- If the response is an intelligent document, meaning it includes an identifying tag, Workshare Professional recognizes to which version of the original document the response relates and the Import Response page is displayed as follows:

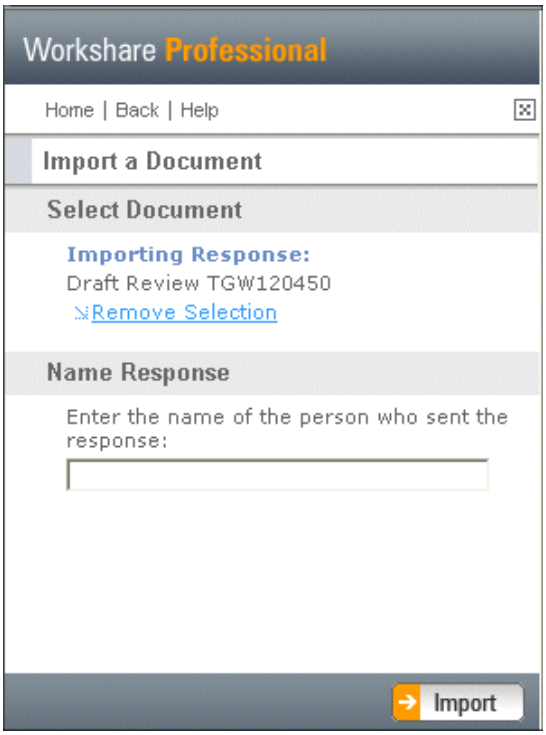

Workshare Professional
Home | Back | Help
Import a Document
Select Document
Importing Response:
#65896v3_Interwoven8_ - Social security numbers created in office 2000 doc
Remove Selection
Name Response
Enter the name of the person who sent the response:
SENT VERSION
The response you have chosen is an intelligent document. It will be compared against version 3 of the original document.
Import

NOTE: If you are working with a document not saved in your DMS, or that does not have previous versions, there may be a drop-down list of previous drafts of the same document that were sent for review.

- If the response is not an intelligent document, meaning it does not include an identifying tag, Workshare Professional does not recognize to which version of the original document the response relates and the Import a Document page is displayed as follows:


Workshare Professional
Home | Back | Help
Import a Document
Select Document
Importing Response:
#60v2 - Workshare Quick R eference Guide.doc
Remove Selection
Name Response
Enter the name of the person who sent the response:
SENT VERSION
The imported response will be compared against a version of your document to identify changes.
Please select which version of your document you originally sent out from the list below:
Select a version:
Import

When working with a DMS



When not working with a DMS

4. In the text field in the **Name Response** area, enter the name of the person who sent the response you are going to import.
5. When working with a DMS and if the response is not an intelligent document, select the version of the original document into which you want to import the response from the drop-down list in the **Sent Version** area. You can only select a version that has been sent for review. Any versions not sent for review are not included in the drop-down list. If there is only one possible version, there is no drop-down list in the **Sent Version** area.

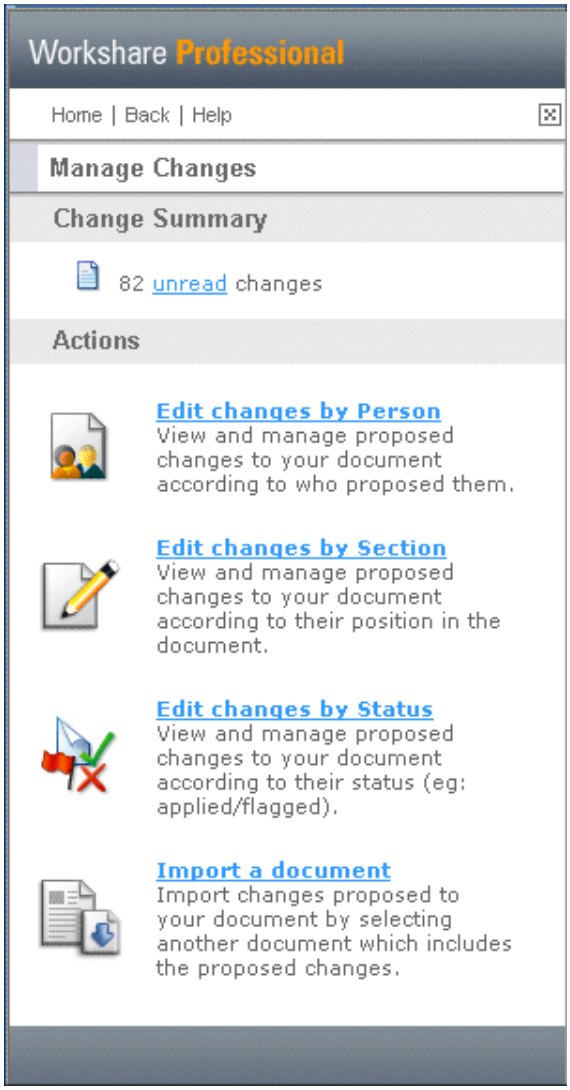
6. Click **Import**. Workshare Professional imports the response by performing a comparison between the selected version of the original document and the response document. When the import is complete, the Manage Changes page is displayed in the Workshare Panel and you can now view the response document and review the changes. Refer to *Reviewing Responses*, below.

Reviewing Responses

Once you have imported responses, you can view all the changes proposed to your document. Workshare Professional enables you to quickly and easily see all the pertinent facts, such as which reviewer proposed the change, the precise location of the change as well as the details of the change itself. You can navigate smoothly between changes and select to apply changes to your original document as required.

To review responses:

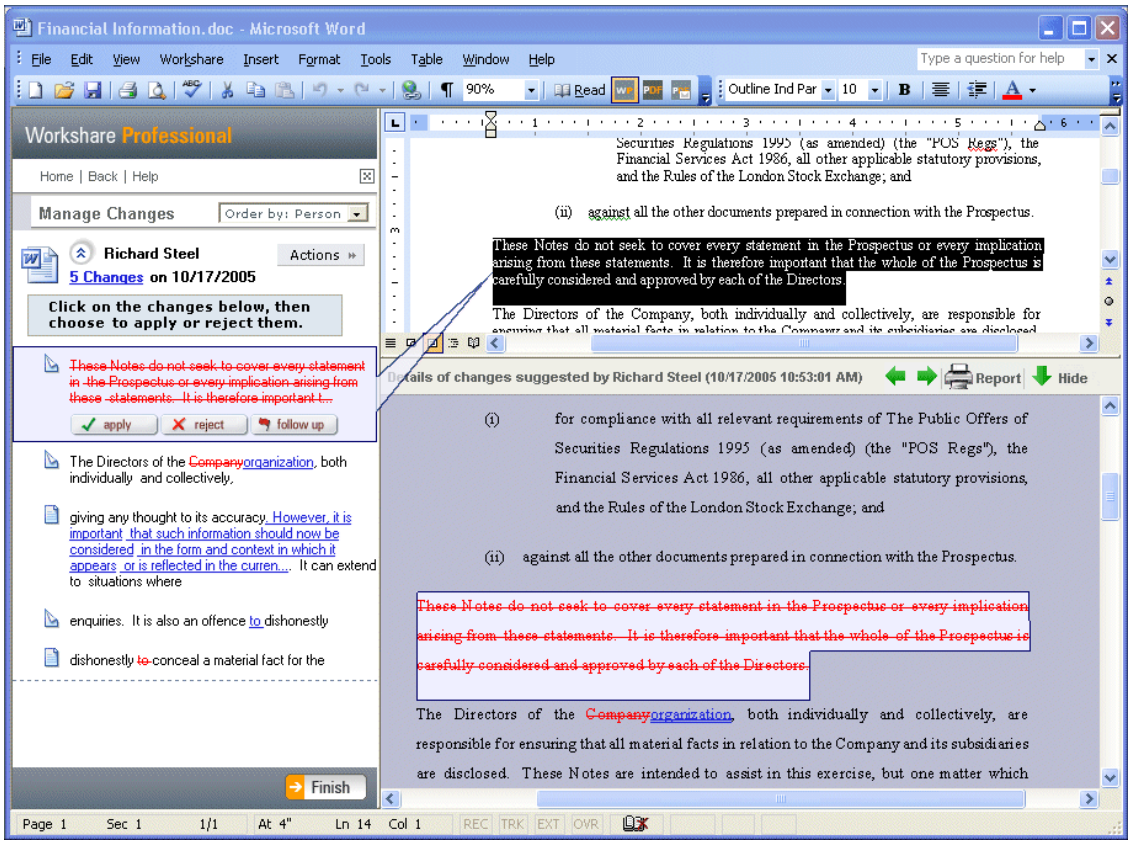
From the *Workshare menu*, select **Manage Changes** or click **Manage Changes** in the Home page of the Workshare Panel. The Manage Changes page is displayed as follows:


Workshare Professional
Home | Back | Help
Manage Changes
Change Summary
82 unread changes
Actions
Edit changes by Person
View and manage proposed changes to your document according to who proposed them.
Edit changes by Section
View and manage proposed changes to your document according to their position in the document.
Edit changes by Status
View and manage proposed changes to your document according to their status (eg: applied/flagged).
Import a document
Import changes proposed to your document by selecting another document which includes the proposed changes.

The Manage Changes page displays a summary of the changes proposed to the document - both unread changes and changes flagged for follow up. The **Actions** area of the page enables you to do the following:

- Display and manage proposed changes according to who proposed them
- Display and manage proposed changes according to their position in the document
- Display and manage proposed changes according to their status, for example, applied, flagged
- Import changes to the document

Selecting one of the **Edit changes**... options lists all the proposed changes in the Manage Changes page. The sample screen shown below shows changes displayed according to the reviewer that proposed the changes (**Edit changes by Person**). For a detailed description of how changes can be displayed in the Manage Changes page, refer to *Displaying Changes*, page 51.



Selecting a change in the Manage Changes page highlights the selected change in both the original document (displayed in the upper right area) and in the Redline document (displayed in the lower right area). Three action buttons – **apply**, **reject** and **follow up** – are displayed below the change in the Manage Changes page.

NOTES:

If it takes some time for Workshare Professional to find the change, for example, in very long documents, a progress bar indicates the progress of the find process.

If Workshare Professional cannot find the location of the change in the original document, a message is displayed requesting that you locate the change manually.

The Redline document is the result of comparing the imported response against the original document. The relevant Redline document is displayed according to the change selected.

You can continue to navigate between changes and apply them or reject them as required. Refer to *Managing Changes*, page 59.

Displaying Changes

When working with a DMS, changes in the Manage Changes page are displayed according to the version to which they relate. This means all changes to version 1 of the document are displayed under **Changes proposed to Version 1**, all changes to version 2 under **Changes proposed to Version 2** and so on. Under each version, you can display the changes in three different ways – by person (reviewer), by section according to the order in the document in which they occur and by status, such as applied or rejected.

When not working with a DMS, no version information is displayed. You can also display the changes by person, section and status.

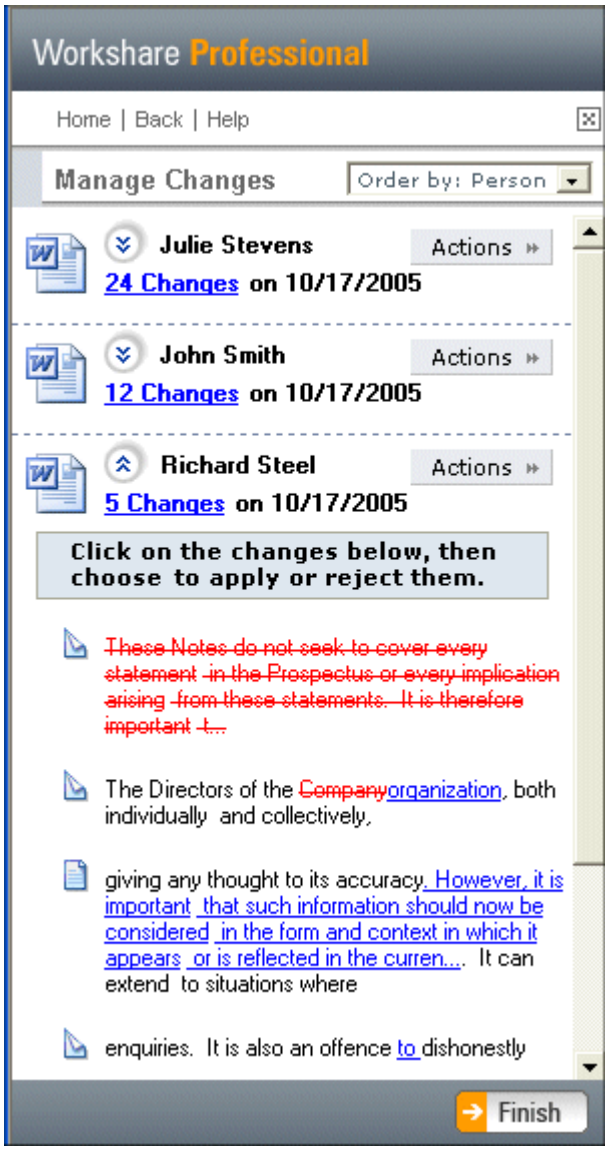
The different ways of displaying proposed changes in the Manage Changes page are described in the following sections.

Person

Clicking **Edit changes by Person** lists all the changes according to the name of the reviewer who made them. (The name is the name of the person who sent the response or the name you entered when importing the response.) Under each reviewer's name, the changes are displayed in the order they appear in the document.

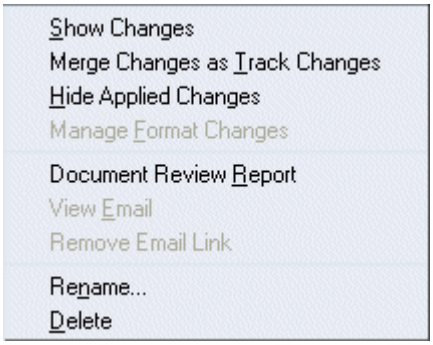
NOTE: You can also select **Order by: Person** from the drop-down list at the top of the Manage Changes page, once changes are displayed.

Click a reviewer's name or the changes link **2 Changes** or select **Show Changes** from the drop-down **Actions** menu to display/hide the changes made by that person below their name.


Workshare Professional
Home | Back | Help
Manage Changes
Order by: Person
Julie Stevens
Actions
24 Changes on 10/17/2005
John Smith
Actions
12 Changes on 10/17/2005
Richard Steel
Actions
5 Changes on 10/17/2005
Click on the changes below, then choose to apply or reject them.
These Notes do not seek to cover every statement in the Prospectus or every implication arising from these statements. It is therefore important t...
The Directors of the Companyorganization, both individually and collectively,
giving any thought to its accuracy. However, it is important that such information should now be considered in the form and context in which it appears or is reflected in the curren... It can extend to situations where
enquiries. It is also an offence to dishonestly
Finish

NOTE: In Person view and Section view, inserted bulleted and numbered lists are shown separately in the list of changes.

Click the **Actions** button to reveal the following drop-down menu:



The options are as follows:

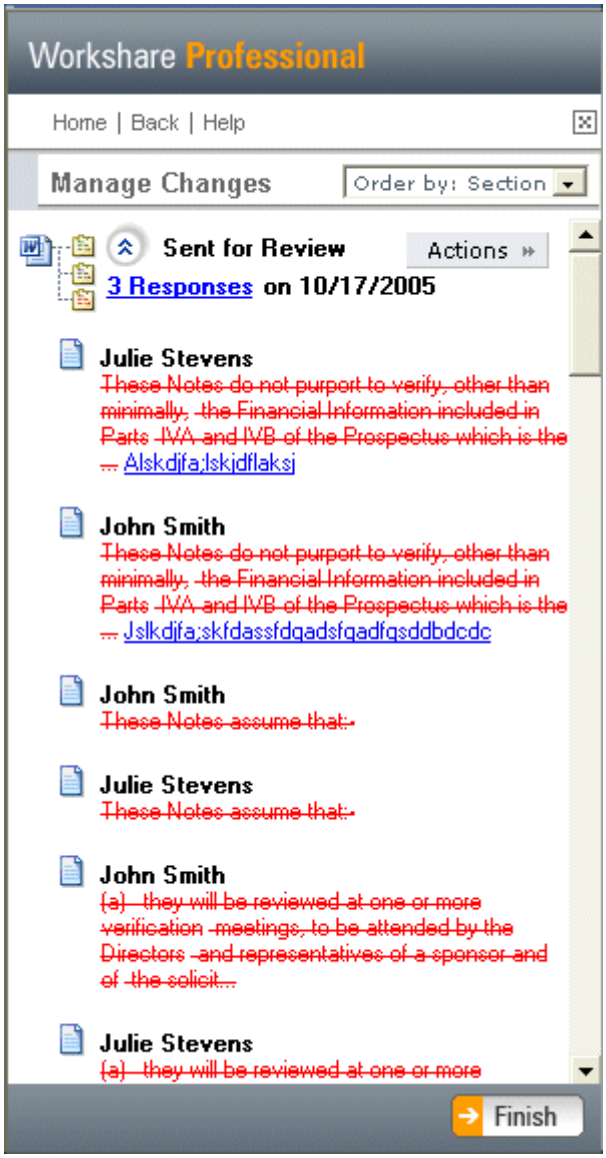
Option	Description
Show Changes	Displays the changes made by the reviewer below their name.
Accept/Reject All Changes using Workshare	Displays the changes made by the reviewer below their name and selects all the changes. This is indicated by a selected checkbox to the left of each change. You can then apply or reject all or some of the changes. Refer to *Applying Multiple Changes*, page 61.
Merge Changes as Track Changes	Enables you to merge all the changes from the response document into the original document as tracked changes by using Microsoft's Word Merge function. Refer to *Applying Multiple Changes*, page 61.
Manage Format Changes	Enables you to manage changes to the formatting of a document.
Document Review Report	Enables you to generate a report of the changes proposed by the reviewer. Refer to *Chapter 12: Creating Reports*.
View Email	Opens the email sent by the reviewer when submitting their response.
Remove Email Link	Removes the link to the email sent by the reviewer when submitting their response.
Rename	Enables you to modify the name of the reviewer.
Delete	Enables you to delete the reviewer and their proposed changes from the Manage Changes page. This action cannot be undone and you would have to import the response again if you wanted to see the reviewer's changes.

Section

Clicking **Edit changes by Section** lists all the changes according to the following criteria:

- The version of the document sent for review.
- The draft of the document sent for review, meaning the date and time the document was sent.
- The order the proposed changes appear in the document.

NOTE: You can also select **Order by: Section** from the drop-down list at the top of the Manage Changes page, once changes are displayed.


Workshare Professional
Home | Back | Help
Manage Changes
Order by: Section
Sent for Review
Actions
3 Responses on 10/17/2005
Julie Stevens
These Notes do not purport to verify, other than minimally, the Financial Information included in Parts IVA and IVB of the Prospectus which is the ... Alskdjfa;lskjdflaksj
John Smith
These Notes do not purport to verify, other than minimally, the Financial Information included in Parts IVA and IVB of the Prospectus which is the ... Jslkdjfa;skfdassfdgadsfgadfgsddbdcdc
John Smith
These Notes assume that:-
Julie Stevens
These Notes assume that:-
John Smith
(a) they will be reviewed at one or more verification meetings, to be attended by the Directors and representatives of a sponsor and of the solicit...
Julie Stevens
(a) they will be reviewed at one or more
Finish

The name of the reviewer who proposed the change is shown above the change.

NOTE: In Person view and Section view, inserted bulleted and numbered lists are shown separately in the list of changes.

Click the **Actions** button to reveal the following drop-down menu:

The options are as follows:

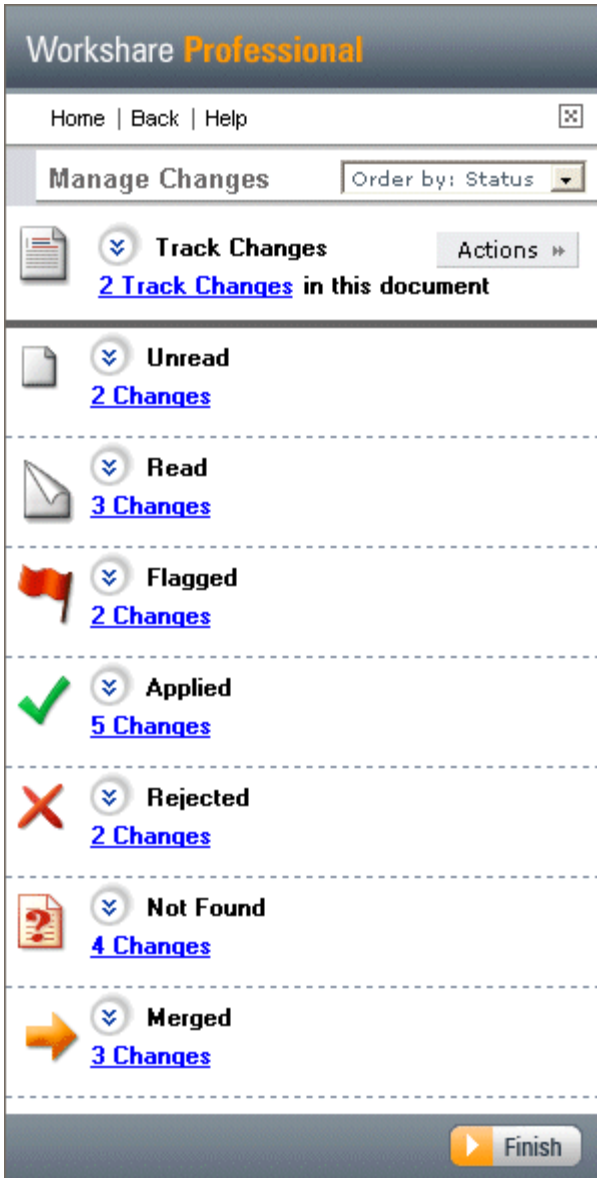
Option	Description
Show Changes	Displays the changes proposed to this version and this draft in the order they occur in the document.
Hide Applied Changes	Hides the changes that have been applied. When the changes are displayed below the reviewer's name, the applied changes are not shown. The number of changes that are hidden is shown in parentheses after the reviewer's name.
Manage Format Changes	Enables you to manage changes to the formatting of a document.
Document Review Report	Enables you to generate a report of the changes proposed by the reviewer. Refer to *Chapter 12: Creating Reports*.

Status

Clicking **Edit changes by Status** lists all the changes according to their status, as follows:

- **Track Changes:** Changes to the document that have been recorded as track changes.
- **Unread:** Changes that have not yet been read.
- **Read:** Changes that have been read but no action has yet been taken.
- **Flagged:** Changes that have been flagged for follow up.
- **Applied:** Changes that have been applied in the original document.
- **Rejected:** Changes that have been rejected, meaning they are not wanted in the original document.
- **Merged**: Changes in a response document that have been merged as track changes into the original document using Microsoft Word's Merge functionality.
- **Not Found:** Changes that Workshare Professional was unable to locate. For example, where you have selected to apply all changes, those changes that could be applied are marked as applied, and those that could not are marked as not found. You can then click through them manually and apply them individually.

NOTE: You can also select **Order by: Status** from the drop-down list at the top of the Manage Changes page, once changes are displayed.



Double-click a status to display the changes with that status below. The name of the reviewer who proposed the change is shown above the change.

TIP! When selecting a change in any view, the name of the reviewer and the date and time of submission are shown above the Redline document

Details of changes suggested by Marlon (05/11/2004 13:47:53)

Redline Document

The Redline document, displayed in the lower right area, is a copy of the original document with a reviewer's changes marked. The Redline document is the result of a comparison between the original document and an imported response. It has a gray/blue background color and cannot be edited. Depending on the change selected in the Manage Changes page, the relevant Redline document is shown in the lower right area.

Changes in the Redline document are represented by different colors, as follows:

Inserted text is blue and double underlined

~~Deleted text is red and struck through~~

The toolbar displayed above the Redline document includes the following buttons:

	Navigates to the previous change and highlights the entire change in both the Redline document and the original document. Refer to *Navigating Between Changes*, page 70.
	Navigates to the next change and highlights the entire change in both the Redline document and the original document. Refer to *Navigating Between Changes*, page 70.
	Enables you to print a report of the changes proposed to a selected version and draft. Refer to *Chapter 12: Creating Reports*.
	Hides/displays the Redline document.

The name of the reviewer and the date and time of submission are shown above the Redline document.

Original Document

The original document is updated with changes as they are accepted. At any time you may edit and format the original document exactly as you would any ordinary Microsoft Word document. For example, even after you have accepted a change into the original document, you can still edit or delete it manually. You can also copy text from the Redline document into the original document.

Copying Text from the Redline Document

You can select whole blocks of text in the Redline document and move it into the original document by dragging and dropping or using copy/paste functionality.

To drag and drop:

1. Select the text in the Redline document that you want to copy into the original document.
2. Click in the selected text and, holding the left mouse button down, move the cursor to the position in the original document where you want to copy the text.
3. Release the mouse button.

To copy and paste:

1. Select the text in the Redline document that you want to copy into the original document.

2. Copy the selection to the clipboard by pressing **Ctrl** and **C** on your keyboard, selecting **Copy** from the *Edit* menu or clicking the **Copy** button in the toolbar.
3. Position the cursor in the original document where you want the text to be inserted.
4. Copy the selection from the clipboard by pressing **Ctrl** and **V** on your keyboard, selecting **Paste** from the *Edit* menu or clicking the **Paste** button in the toolbar. The text is copied to the original document.

Any mark-up in the text (introduced as part of the comparison process) is stripped out. Changes that are either deletions or the sources of moved text are not copied across.

MANAGING CHANGES

After sending a document for review and then receiving responses back from the reviewers, it is useful to work through the changes proposed by reviewers and handle them one by one. You can select to accept a change, reject it or mark it for future attention. A handy icon is added to the left of the change in the Manage Changes page and in the Redline document to indicate that you have dealt with the change. This is useful to avoid missing changes.

At any time, you can continue to work on your original document using standard Microsoft Word functionality making your own changes without reference to changes proposed by others.

Applying Changes Automatically

As you review the changes proposed by reviewers, you may decide you would like to implement the change in the original document.

To apply a change:

1. Select the change in the Manage Changes page. The selected change is highlighted in both the original document and in the Redline document and the following action buttons are displayed below the change in the Manage Changes page.

If the parameter, **Display Change Location Arrows when navigating changes (requires restart of Word)** is selected (**Administration** category of Workshare Configuration Manager), an arrow points from the change selected in the Workshare Panel to the change in the original document. If this parameter is not selected, a popup balloon is displayed over the change in the original document as follows:

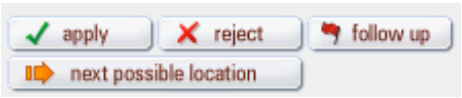
2. Click **apply** in the Manage Changes page or in the popup balloon. The change is implemented in the original document, for example, new text is inserted. The change is marked with a green tick both in the Manage Changes page and in the Redline document. The action buttons below the change are now displayed as follows:

NOTE: If you want to reverse your action and remove the change from the original document, click **Undo**. The icon is displayed to the left of the change in the Manage Changes page to show that it has been "undone".

If you are not sure whether you want to apply the change, you can click **follow up** instead of **apply**. This marks the selected change as requiring attention at a later time, indicated by a large red flag in the Manage Changes page and small brown flags against each line of the change in the Redline document. The change is not applied in the original document at this stage.

Multiple Changes Found

Workshare Professional may detect several locations where a change could be applied. For example, if you have more than one occurrence of a certain phrase or paragraph then a change could possibly be applied in two places. If so, when you select the change in the Manage Changes page, a **next possible location** button is displayed. You must decide in which location you want to apply the change.



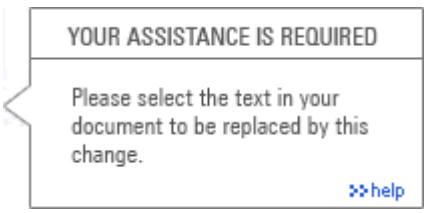
To select a change position:

1. Click **next possible location** to scroll to the next potential position.
2. Continue to click **next possible location** until you find the position where you would like to apply the change.
3. Click **apply**.

Applying Changes Manually

Sometimes Workshare Professional cannot find the location of the change. For example, the change may suggest that a line of text is deleted and you have already deleted or modified this text in the original document. Also, if the paragraph or section that includes the change has been edited significantly since the document was sent out for review.

If Workshare Professional cannot find the location of a selected change, the **apply** button is not enabled and a popup balloon is displayed next to the change in the Manage Changes page requesting that you locate the change manually in the original document. For example:



To apply the change, simply position the cursor at the required point in the original document. For example, if the change proposes to insert a line of text, simply position the cursor in the original document at the point where you would like the text inserted. The **apply** button is then enabled. Click **apply** and the change is implemented in the original document.

Rejecting Changes

As you review the changes proposed by reviewers, you may decide you do not want to implement the change in the original document. You can therefore reject the change, clearly indicating that you do not want to give the change further attention.

To reject a change:

Select the change in the Manage Changes page and click **reject**. In the Manage Changes page, the change is marked with a large red cross and in the Redline document, each line of the change is marked with small red crosses.

NOTE: If you want to reverse your action, click **Undo**. The change is no longer marked as rejected. The icon is displayed to the left of the change in the Manage Changes page to show that it has been "undone".

If you are not sure whether you want to reject the change, you can click **follow up** instead of **reject**. This marks the selected change as requiring attention at a later time, indicated by a large red flag in the Manage Changes page and small brown flags against each line of the change in the Redline document. The change is not applied in the original document at this stage.

Applying Multiple Changes

Workshare Professional provides two options to apply multiple changes to a document. The two options are:

- Accept/reject all changes using Workshare
- Merge changes as Track Changes using Microsoft Word

The Workshare option is recommended when users wish to maintain the integrity and audit history of all changes. The Microsoft Word option is recommended when users require a time-efficient method of applying mass changes to large or complex documents.

NOTE: Please consult the technical brief, **Managing Changes in Workshare Professional 4.5**, on the Workshare Learning Center for a detailed description on the benefits of each method.

To enable one of the two options to apply multiple changes to a document, please consult your administrator or open the Workshare Configuration Manager (**Administration** settings). Refer to the *Workshare Professional Administration Guide* for more information.

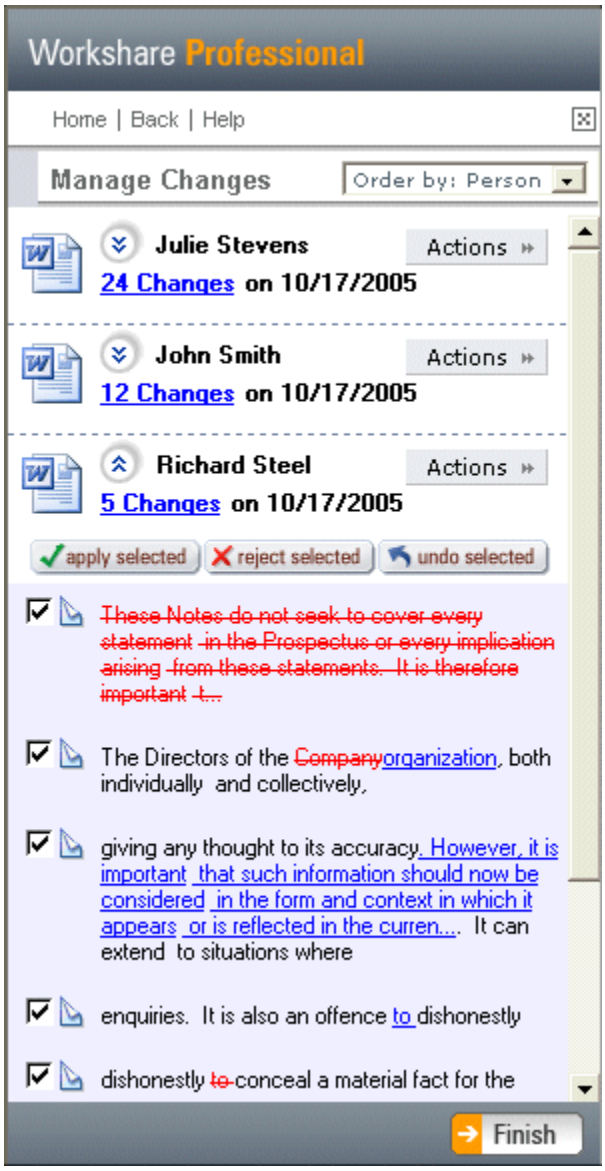
Accept/Reject All Changes Using Workshare

If required, you can apply or reject several changes at the same time.

To work with multiple changes:

1. Display changes by **Person** in the Manage Changes page.

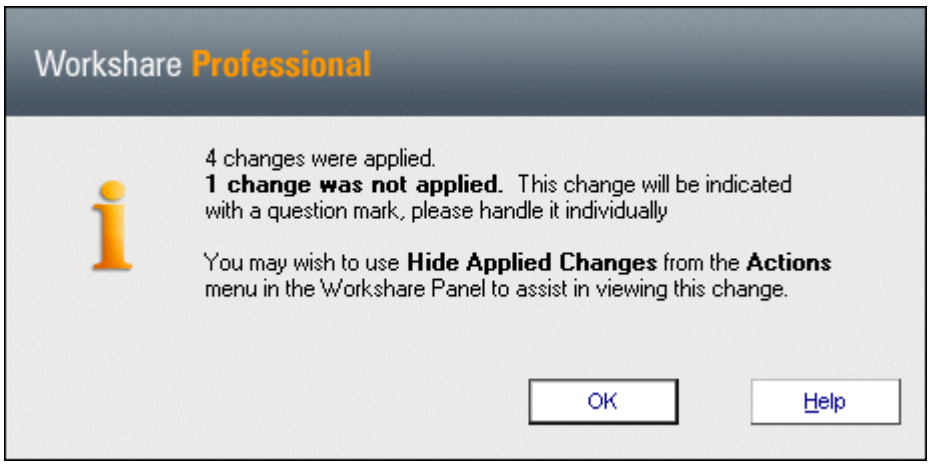
2. From the **Actions** drop-down menu (to the right of the reviewer whose changes you want to apply), select **Accept/Reject All Changes using Workshare**. The changes made by the reviewer are displayed below their name and all the changes are selected. This is indicated by a selected checkbox to the left of each change.


Workshare Professional
Home | Back | Help
Manage Changes
Order by: Person
Julie Stevens
Actions
24 Changes on 10/17/2005
John Smith
Actions
12 Changes on 10/17/2005
Richard Steel
Actions
5 Changes on 10/17/2005
apply selected
reject selected
undo selected
These Notes do not seek to cover every statement in the Prospectus or every implication arising from these statements. It is therefore important t...
The Directors of the Companyorganization, both individually and collectively,
giving any thought to its accuracy. However, it is important that such information should now be considered in the form and context in which it appears or is reflected in the curren... It can extend to situations where
enquiries. It is also an offence to dishonestly
dishonestly to conceal a material fact for the
Finish

3. Deselect some changes if required.
4. Click one of the following buttons:

Button	Description
apply selected	Applies the selected changes in the original document.
reject selected	The selected changes are not applied in the original document and are marked as rejected.
undo selected	The selected changes are undone. For example, if a change had been applied, the apply action would be undone.

The selected changes are applied or rejected or undone according to your selection. A report on the number of changes and the action taken is displayed.


Workshare Professional
4 changes were applied.
1 change was not applied. This change will be indicated with a question mark, please handle it individually
You may wish to use Hide Applied Changes from the Actions menu in the Workshare Panel to assist in viewing this change.
OK
Help

If Workshare Professional cannot carry out the action on a specific change for any reason, it marks the change with the following icon: . For example, there may have been more than one place that the change could have been applied.

Merge Changes as Track Changes

When you import a response document into an original document, Workshare Professional allows you to merge all the changes from the response document into the original document as track changes by using Microsoft Word's Merge function.

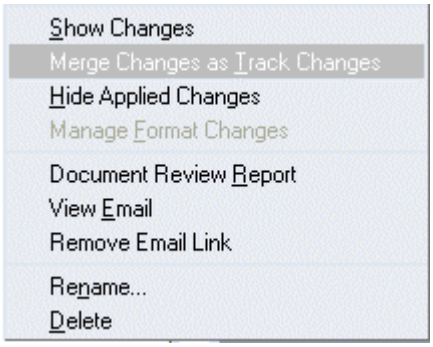
Users familiar with Track Changes may prefer to use Microsoft Word's Merge capabilities to apply multiple changes, as it creates track changes for all the suggested changes in the document.

However, by applying all as track changes:

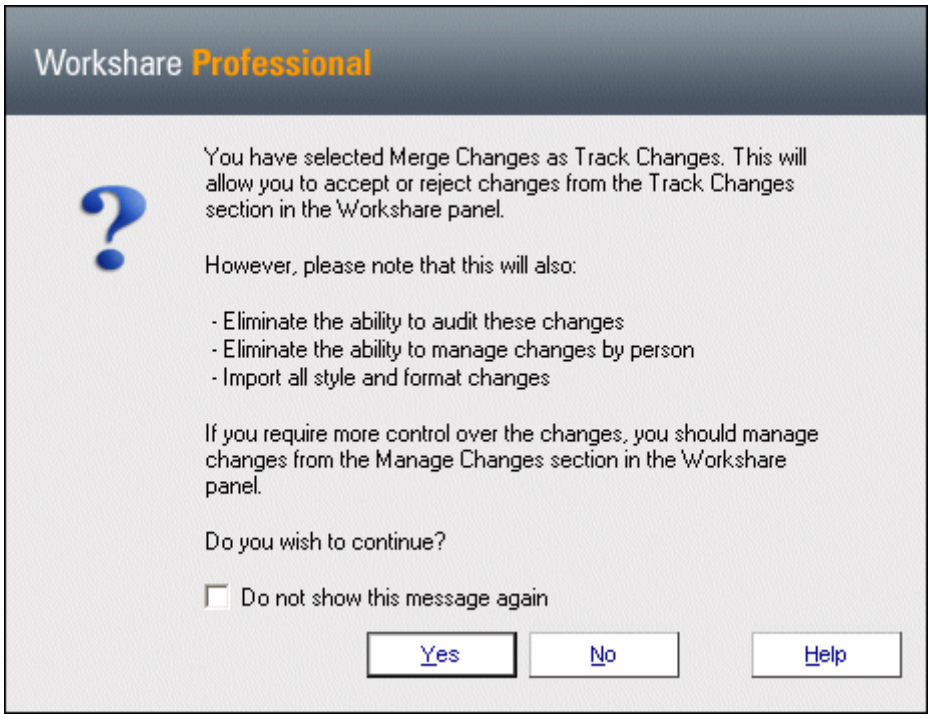
- The Microsoft Word merged track changes will not appear in Workshare reports
- You will be unable to undo these changes at a later date
- The merged track changes will not be synchronized with the identified changes in the reviewer's response section of the Manage Changes panel
- Previously accepted changes using Workshare's functionality will be undone or appear as track changes

To apply all as track changes:

1. This option appears in the *Actions* drop-down menu after you have imported a response document:

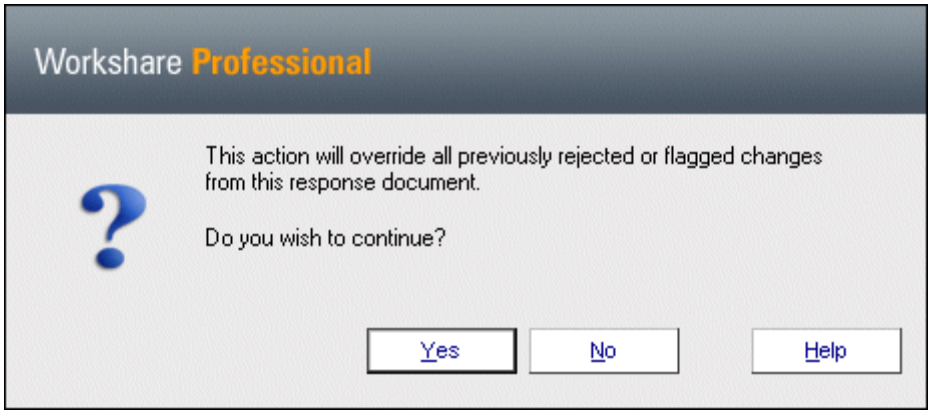


2. Select **Merge Changes as Track Changes**. When you select this option, Workshare displays a message to explain the consequences of applying all track changes.

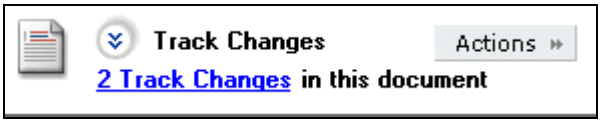

Workshare Professional
You have selected Merge Changes as Track Changes. This will allow you to accept or reject changes from the Track Changes section in the Workshare panel.
However, please note that this will also:
- Eliminate the ability to audit these changes
- Eliminate the ability to manage changes by person
- Import all style and format changes
If you require more control over the changes, you should manage changes from the Manage Changes section in the Workshare panel.
Do you wish to continue?
Do not show this message again
Yes
No
Help

3. Click **Yes** to allow all the changes suggested in the response document to be imported into the original document and appear as track changes. Click **No** to cancel the action.
4. If you have rejected or flagged previous suggested changes to this document, Workshare Professional will display a message explaining that these changes will be marked as applied.

NOTE: Clicking **Yes** will override all previously rejected or flagged changes that have been suggested by the reviewer.


Workshare Professional
This action will override all previously rejected or flagged changes from this response document.
Do you wish to continue?
Yes
No
Help

5. The Manage Changes panel on the left of the document will describe each track change that has been imported into the original document.



6. Click the down arrow to view each particular change that has been imported.
7. To apply or reject all as track changes, select Accept/Reject All Changes from the *Actions* drop-down menu. This will select all changes and display an **Apply Selected** button and a **Reject Selected** button.

8. Click **Apply Selected** to accept these changes or click **Reject Selected** to reject these changes.
9. To apply or reject individual changes, select the change and click the Accept or Reject button.

TIP: If you want to apply or reject the majority of the changes, select Accept/Reject All Changes from the Actions menu and then unselect the checkboxes for the changes that you do not want to apply. Then click **Apply Selected** or **Reject Selected** as required.

Chapter 6: Comparing Documents from within Microsoft Word

This chapter describes how to compare documents using Workshare Professional from within Microsoft Word. It includes the following sections:

- **Overview**, below, introduces the comparison functionality of Workshare Professional.
- **Performing a Comparison**, page 67, describes how to compare a document against an earlier version of the document or against a different document, and describes the Redline document – the result of the comparison.

For information about comparing documents using Workshare DeltaView, refer to *Chapter 7: Comparing Documents Using Workshare DeltaView*.

Overview

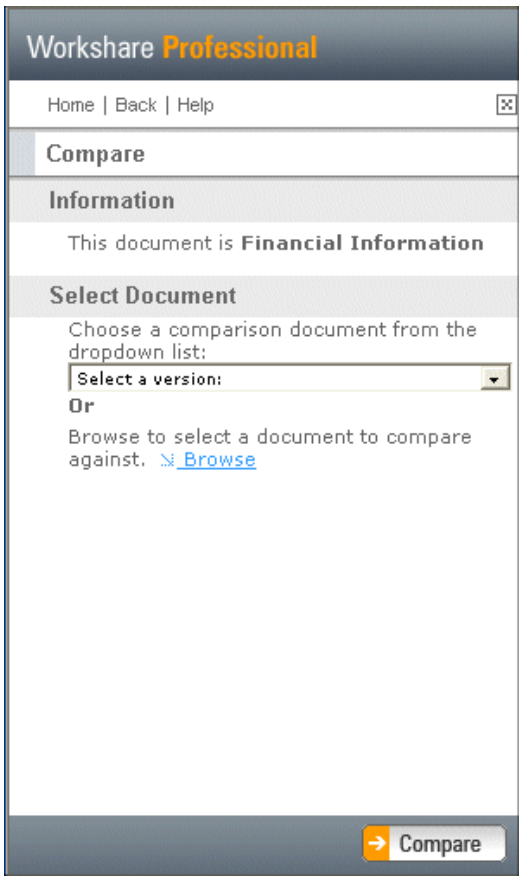
Workshare Professional enables you to compare two documents within Microsoft Word and instantly see any differences between them. You can compare a document against an earlier or later version of the same document or against a different document. Comparison results are displayed in a Redline document within Microsoft Word with changes clearly marked. For example, ~~deleted text is red and struck through~~ and added text is blue and double underlined. In one view, you can see both the original document and the comparison document.

PERFORMING A COMPARISON

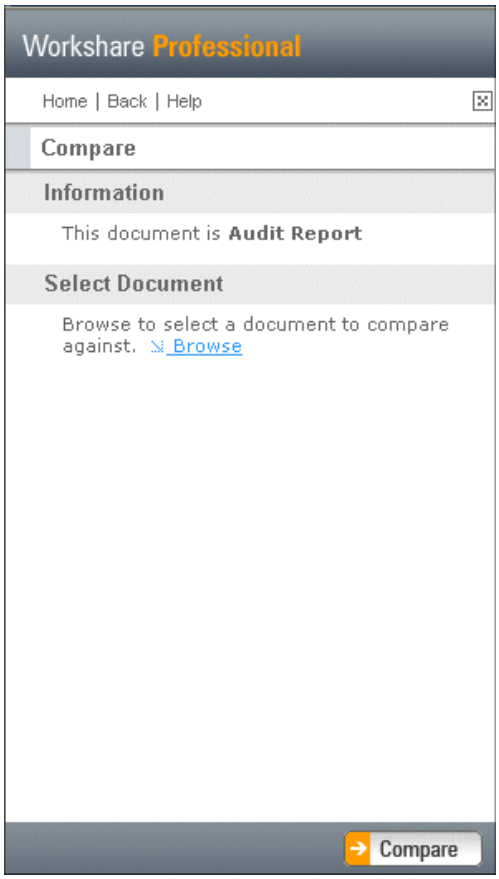
You can compare your original document against a previous version of the document or against another document entirely. You can also compare any two versions of a document. For example, there may be ten versions of a document in your DMS. You can open version 3 and compare it against version 5.

To compare documents:

1. From the *Workshare menu*, select **Compare Versions** or click **Compare** in the Home page of the Workshare Panel. The Compare page is displayed as follows:



When working with a DMS

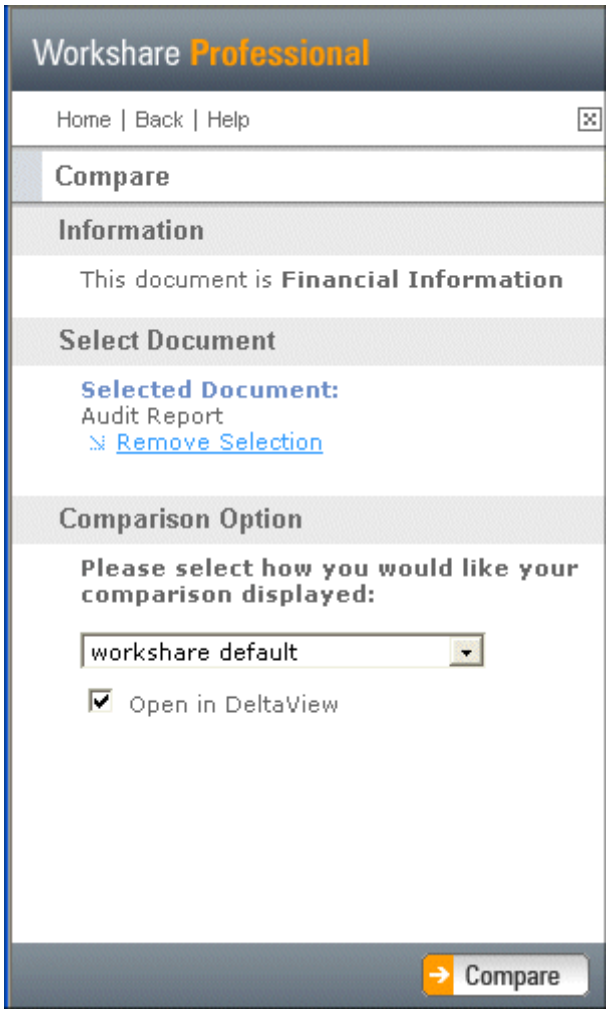


When not working with a DMS

2. Select the document against which you want to compare the current document in one of the following ways:
   - Select a version of the document from the drop-down list. This option is only available when working with a DMS.

     NOTE: If you are working with a document not saved in your DMS, or that does not have previous versions, there may be a drop-down list of previous drafts of the same document that were sent for review.
   - Click **Browse** and select a document from your DMS or locally.

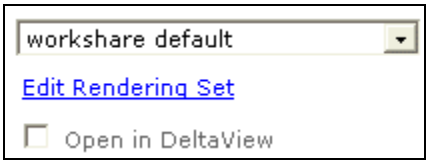
The Compare page is displayed as follows:



TIP! If you want to change the selected document, click the **Remove Selection** link and select a different document.

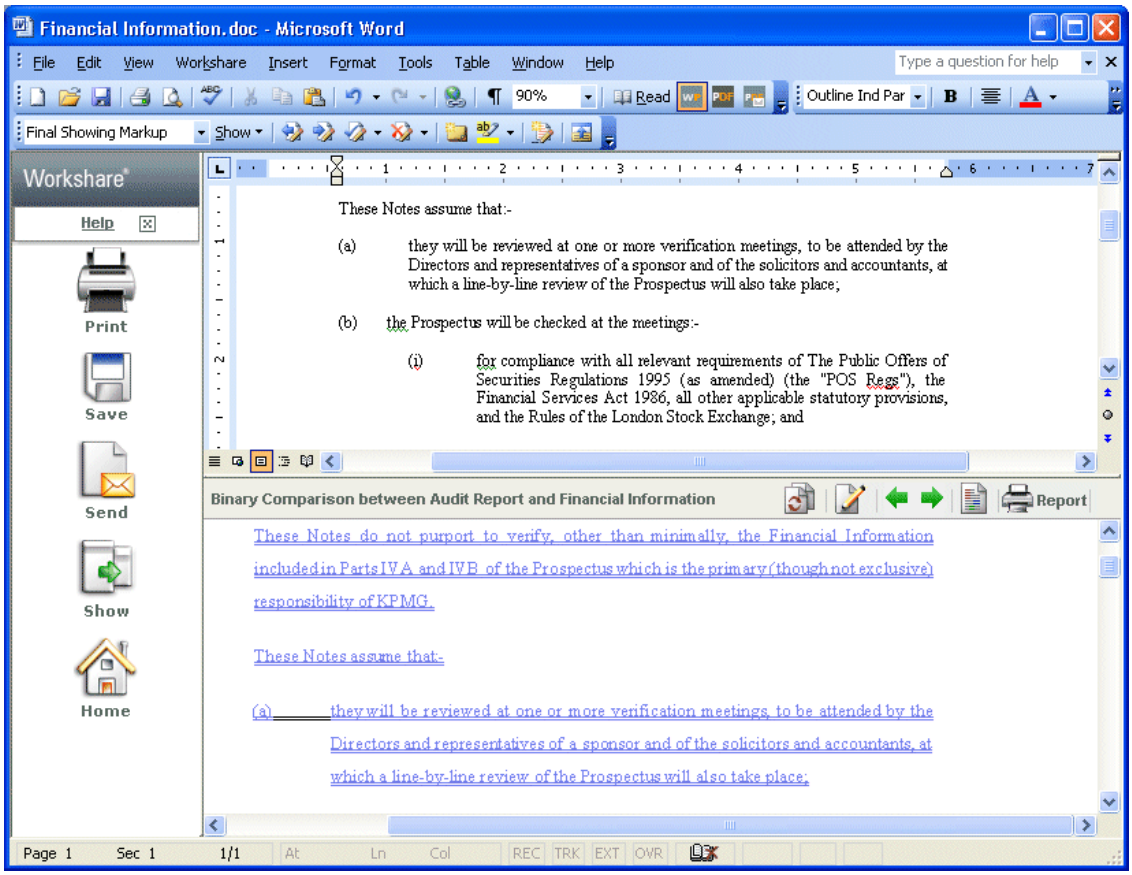
3. If required, select a rendering set from the drop-down list in the **Comparison Options** area to determine how the comparison document is displayed. For example, deleted text could be shown in ~~red with a strikethrough~~. For further information about rendering sets, refer to *Appendix B: Configuring Rendering Sets*.

4. If required, select the **Open in DeltaView** checkbox to perform the comparison using Workshare DeltaView. Refer to *Chapter 7: Comparing Documents Using Workshare DeltaView* for information about comparing documents using Workshare DeltaView. If you do not select this checkbox, the page is displayed as follows:



5. Click **Edit Rendering Set** if you want to change how the comparison document is changed. For further information about rendering sets, refer to *Appendix B*: *Configuring Rendering Sets*.
6. Click **Compare**. Workshare Professional performs the comparison. A progress bar indicates the progress of the compare process.

When the comparison is complete, the results of the comparison are displayed in a comparison (Redline) document in the lower right area. The original document remains open in the upper right area.


Financial Information.doc - Microsoft Word
File Edit View Workshare Insert Format Tools Table Window Help
Type a question for help
Final Showing Markup
Show
Workshare
Help
Print
Save
Send
Show
Home
These Notes assume that:-
(a) they will be reviewed at one or more verification meetings, to be attended by the Directors and representatives of a sponsor and of the solicitors and accountants, at which a line-by-line review of the Prospectus will also take place;
(b) the Prospectus will be checked at the meetings:-
(i) for compliance with all relevant requirements of The Public Offers of Securities Regulations 1995 (as amended) (the "POS Regs"), the Financial Services Act 1986, all other applicable statutory provisions, and the Rules of the London Stock Exchange; and
Binary Comparison between Audit Report and Financial Information
Report
These Notes do not purport to verify, other than minimally, the Financial Information included in Parts IV A and IV B of the Prospectus which is the primary (though not exclusive) responsibility of KPMG.
These Notes assume that:-
(a) they will be reviewed at one or more verification meetings, to be attended by the Directors and representatives of a sponsor and of the solicitors and accountants, at which a line-by-line review of the Prospectus will also take place;
Page 1 Sec 1 1/1

The Redline document clearly displays the changes between your original document and the selected document. Changes are marked according to the rendering set applied to the comparison. For example, ~~deleted text is red and struck through~~ and added text is blue and double underlined.

Selecting a change in the Redline document scrolls to the change and highlights it in the original document.

You can continue working in the original document as required. At any time, you can again compare the original document with a previous version or another document by clicking **Show** in the Workshare Panel and repeating the procedure described on page 67.

You can navigate between the changes in the Redline document, switch the original and modified documents, import the changes into the original document, save the Redline document, print it or email it using the tools available in the toolbar located above the Redline document and the options provided in the Workshare Panel. These options are described in the following pages.

Click **Home** in the Workshare Panel to close the Redline document and return to the Home page of the Workshare Panel.

Navigating Between Changes

After performing a comparison, you can review the Redline document (the result of the comparison) and consider the changes between the two documents. You can move between changes in the Redline document by jumping from change to change.

Click in the toolbar above the Redline document to move to the previous change and highlight the entire change in the Redline document and in the original document.

Click in the toolbar above the Redline document to move to the next change and highlight the entire change in the Redline document and in the original document.

Edit the Rendering Set

You can edit the way the changes are presented in the Redline document by editing the rendering set applied to the comparison.

Click in the toolbar above the Redline document. For further information about rendering sets, refer to *Appendix B*: *Configuring Rendering Sets*.

Swapping the Source Documents

You can re-run a comparison exchanging the original document for the modified document and the modified document for the original document. For example, if Document A was the original document and Document B was the document you selected to compare Document A against, Workshare Professional compares Document A to Document B and presents the changes made to Document A.

Click in the toolbar above the Redline document to swap the original and modified documents so that Document B is now the original document and Document A is the document selected to compare Document B against. Workshare Professional automatically re-runs the comparison, comparing Document B to Document A, and presents the changes made to Document B.

Importing Changes into the Original Document

You can import the changes detailed in the Redline document into the original document.

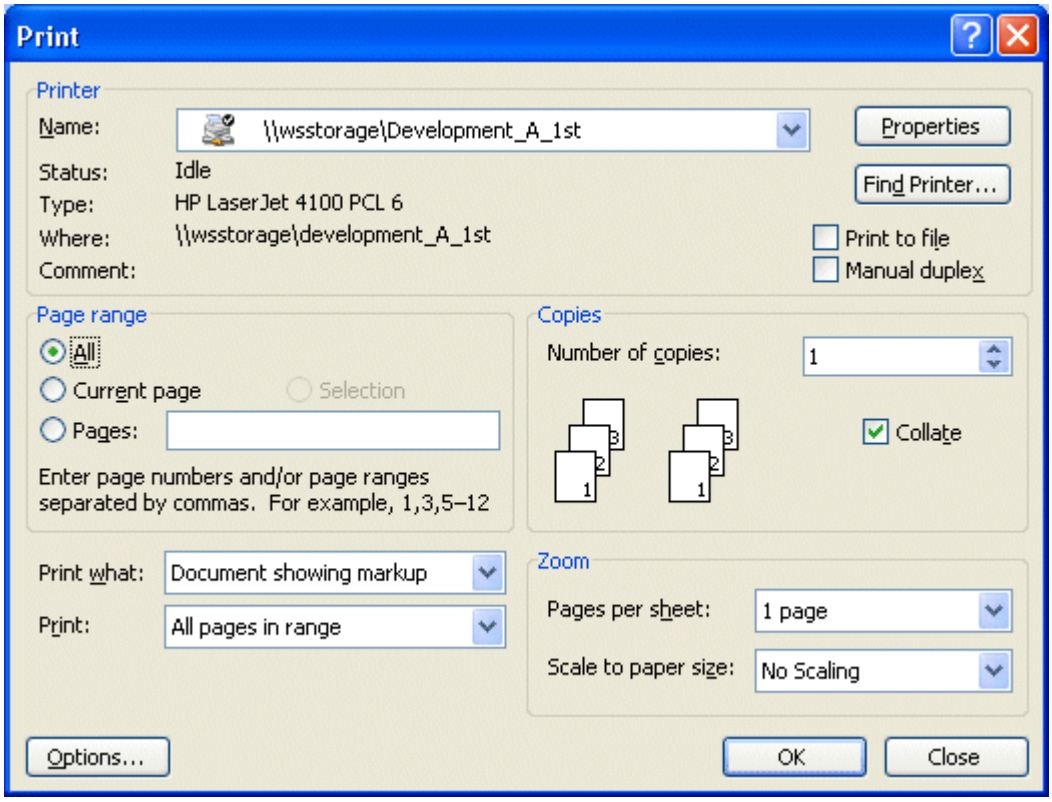
Click . The changes detailed in the Redline document are imported into the original document. The original document and the Manage Changes page of the Workshare Panel are displayed. You can then select to incorporate the changes into the original document as required. Refer to *Chapter 5: Managing Responses* for further details.

Printing Redline Documents

You can print the Redline document at any time.

To print a Redline document:

1. Click **Print** in the Workshare Panel or click Report in the toolbar above the Redline document. The *Print* dialog box is displayed.



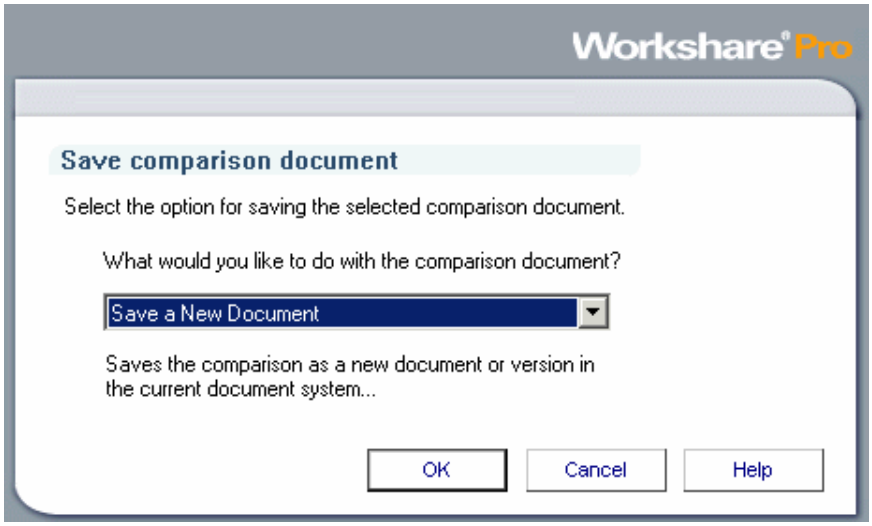
2. Select from the standard print options in the usual way.
3. If you are printing to a black and white printer, select the **Print Redline in black and white** checkbox, as colored text may not appear clearly when printing in black and white.
4. If you only want to print pages of the Redline document that include changes, select the **Only print pages with changes** checkbox.
5. Click **OK**.

Saving Redline Documents

You can save the Redline document as an RTF or Microsoft Word file to your DMS or locally. The following procedure describes how to save to Interwoven 8 as an example.

To save a Redline document:

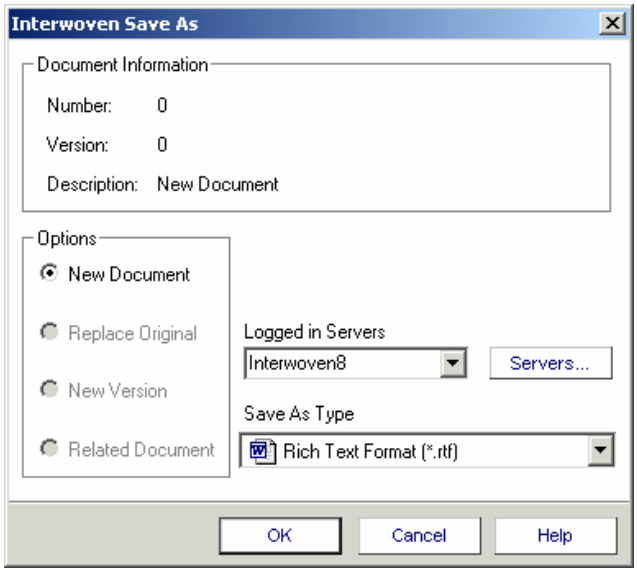
1. Click **Save** in the Workshare Panel. The *Save comparison document* dialog box is displayed.


Workshare Pro
Save comparison document
Select the option for saving the selected comparison document.
What would you like to do with the comparison document?
Save a New Document
Saves the comparison as a new document or version in the current document system...
OK
Cancel
Help

2. From the drop-down list, select how you want to save the document from the following:
   - **Save a New Document**
   - **Attach/Relate to Original Document** (Only available when using the Interwoven or DOCS Open integration and the original document is from Interwoven or DOCS Open)
   - **Attach/Relate to Modified Document** (Only available when using the Interwoven or DOCS Open integration and the modified document is from Interwoven or DOCS Open)

NOTE: The modified document is the current document open in Microsoft Word; the original document is the document selected to compare against the current document.

3. Click **OK**. The *Interwoven Save As* dialog box is displayed.



NOTE: When saving a Redline document locally, the *LocalStore Save As* dialog box is displayed where you can navigate to the location where you want to save the file and enter a name for the file.

The **Document Information** area provides information about the currently open Redline document, if it is already saved. This information includes the DMS document number, the version number and a description. If the Redline document is a new document these fields are empty.

4. In the **Options** area, select the way in which you want to save the Redline document from the following:

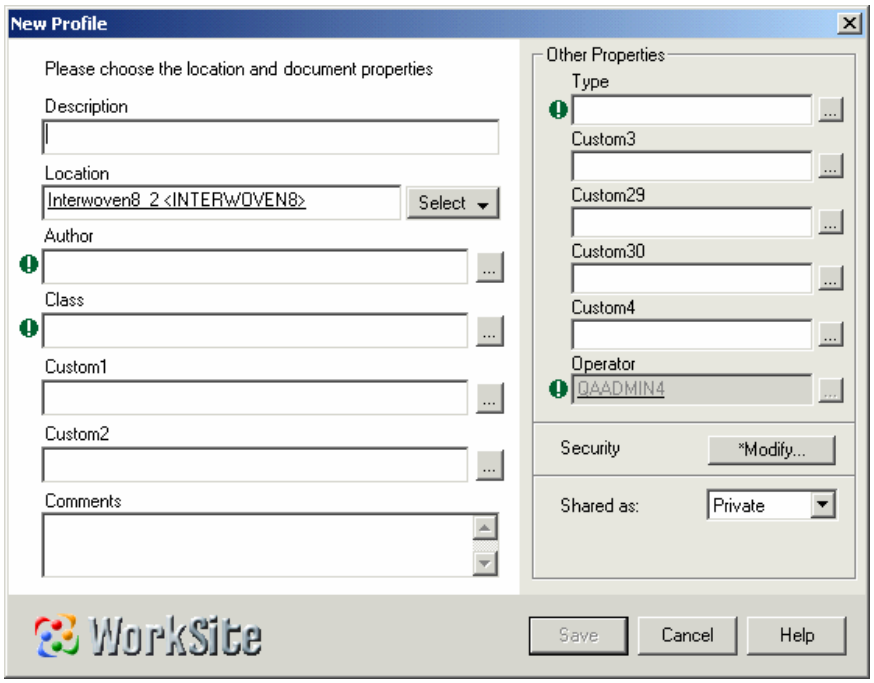
New Document	To save the Redline document as a completely new document. If the Redline document has not been saved before and you selected **Save a New Document** in the *Save Comparison* dialog box, this is the only option enabled.
Replace Original	To replace the original document of the comparison with the Redline document. This option is only enabled if the Redline document has been saved before and you selected **Save a New Document** in the *Save Comparison* dialog box.
New Version	To save the Redline document as a new version. This option is only enabled if the Redline document has been saved before and you selected **Save a New Document** in the *Save Comparison* dialog box.
Related Document	(Interwoven DMS only) To save the Redline document as a related document (related to the original or modified document). This option is only enabled if you selected **Attach/Relate to Original/Modified Document** in the *Save Comparison* dialog box.
New SubVersion	(Hummingbird DMS only) To save the Redline document as a new sub-version. This option is only enabled if the Redline document has been saved before and you selected **Save a New Document** in the *Save Comparison* dialog box.

Attachment	(Hummingbird DMS only) To save the Redline document as an attachment to the original or modified document. This option is only enabled if you are attaching a Redline document to the original or modified document, meaning you selected **Attach/Relate to Original/Modified Document** in the *Save Comparison* dialog box.

5. (Interwoven DMS only) From the **Logged in Servers** drop-down list, select which server you would like to use. This list is a list of previously logged in servers. If you want to log in to a different server, click **Servers**.
6. From the **Save As Type** drop-down list, select the format for the saved file from the following:

Word Document (*.doc)	Saves the Redline document as a Microsoft Word file. The source documents are not saved.
Rich Text Format (*.rtf)	Saves the Redline document as an RTF file. The source documents are not saved.

7. Click **OK**. In Interwoven 8, the following dialog box is displayed:



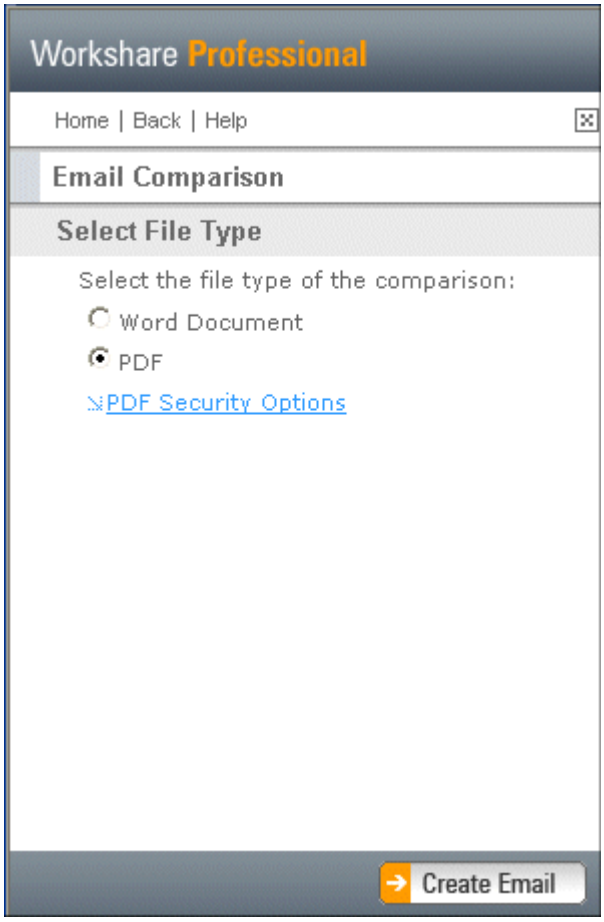
8. Complete the fields as required and click **OK**. The Redline document is saved to the specified location.

Sending Compared Documents by Email

You can send the Redline document (in Microsoft Word format or as a PDF) as an email attachment.

To send a Redline document by email:

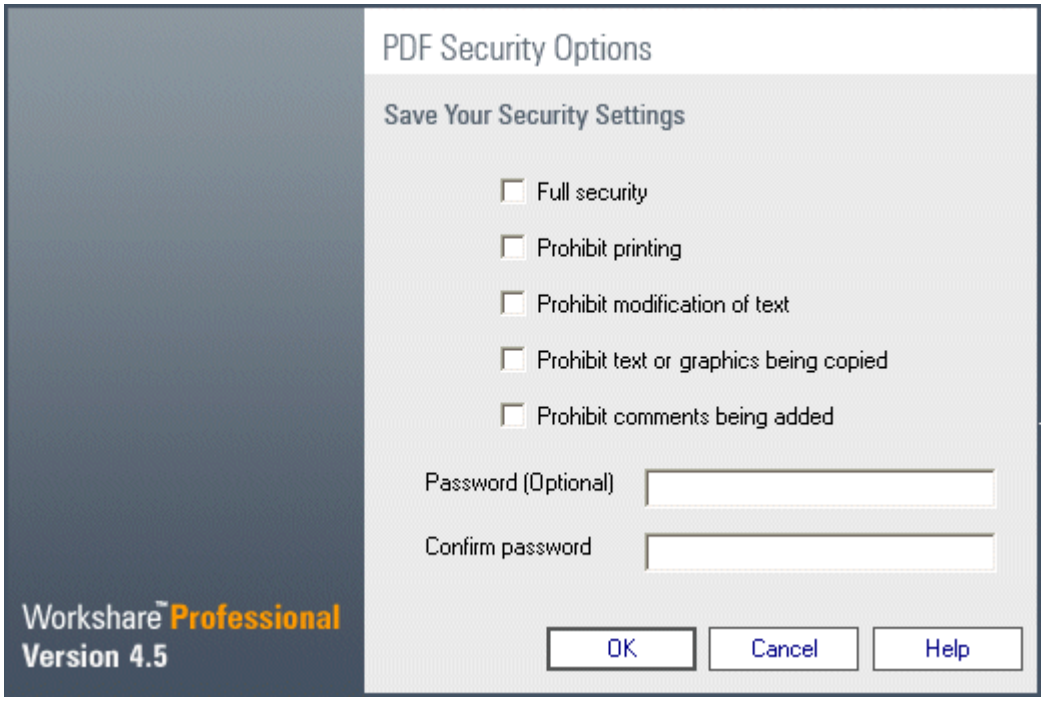
1. Click **Send** in the Workshare Panel. The Email Comparison page is displayed as follows:



2. Select the format in which you want to send the comparison from the following:
   - **PDF**: The comparison will be sent as a PDF file.
   - **Word Document**: The comparison will be sent as a Microsoft Word file (.doc).

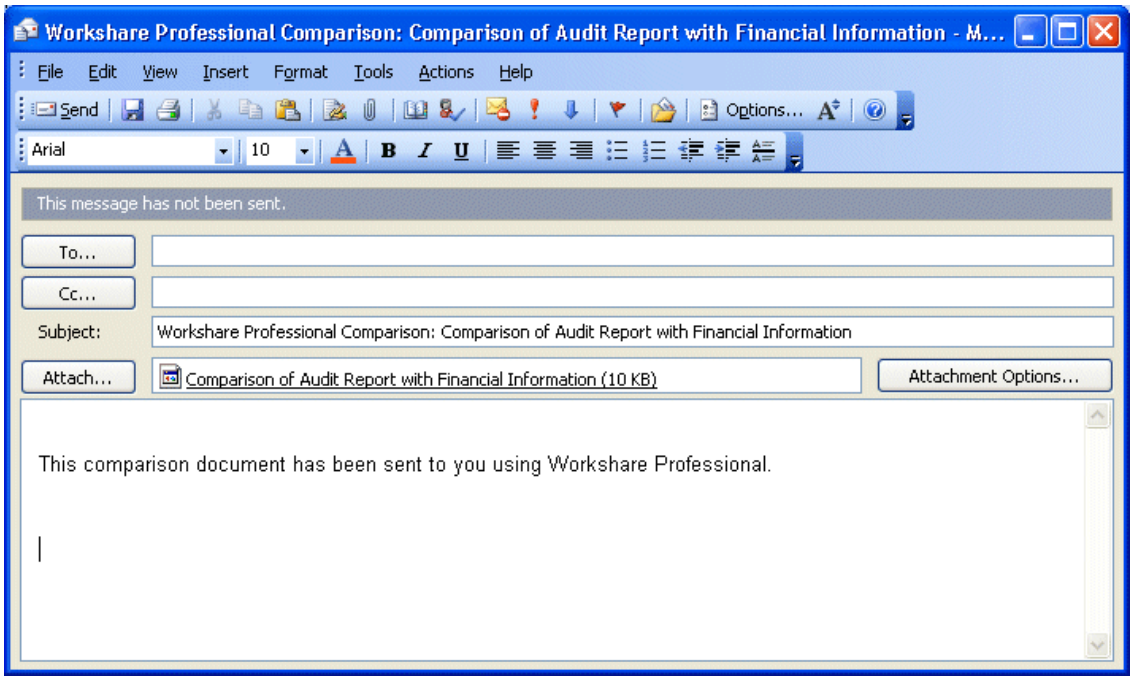
NOTE: If you do not have the Workshare Professional PDF Publisher printer installed, Workshare Professional cannot convert the document to PDF. The document will be sent in Microsoft Word Document format (.doc). Refer to your system administrator.

3. If you selected **PDF** in step 2, you can click the **PDF Security Options** link to set PDF security options. The *PDF Security Options* dialog box is displayed.



4. Select one or more of the security options individually or select the **Full security** checkbox to select them all. The security options are as follows:
   - **Prohibit printing:** Prevents recipients from printing the PDF document.
   - **Prohibit modification of text:** Prevents recipients with Adobe Distiller from editing the PDF document.
   - **Prohibit text/graphics being copied:** Prevents recipients from copying graphics or text directly from the PDF document.
   - **Prohibit comments being added:** Prevents recipients with Adobe Distiller from adding comments to the PDF document.
5. If required, set a password for access to the PDF by entering the password twice to set and confirm the password in the relevant fields. By setting a password, the recipient can remove the security from the PDF (by selecting **Document Security** from the *File* menu in Adobe Acrobat). If you do not specify a password here (and communicate it to the recipient), the recipient cannot change/remove the security set for the PDF.
6. Click **OK**.

7. Click **Create Email**. An email message window is displayed with the comparison in the specified format as an attachment. (If the PDF file type was selected, a progress dialog box indicates the progress of the conversion to PDF.)


Workshare Professional Comparison: Comparison of Audit Report with Financial Information - M...
File Edit View Insert Format Tools Actions Help
Send
Options...
Arial
10
This message has not been sent.
To...
Cc...
Subject:
Workshare Professional Comparison: Comparison of Audit Report with Financial Information
Attach...
Comparison of Audit Report with Financial Information (10 KB)
Attachment Options...
This comparison document has been sent to you using Workshare Professional.

8. Enter the recipient(s) name and any other text you want to include and click **Send**. The file is sent to the specified recipients.

NOTE: Depending on the configuration of Workshare Professional, an email protection dialog box may be displayed before the document is sent. Refer to *Chapter 9: Protecting Email Attachments* for further information.

Chapter 7: Comparing Documents Using Workshare DeltaView

This chapter describes Workshare DeltaView, a standalone application included with Workshare Professional that enables you to compare two documents. It includes the following sections:

- **Overview**, below, introduces the Workshare DeltaView application.
- **Performing Comparisons**, page 78, describes how to compare a document against an earlier version of the document or against a different document using Workshare DeltaView.
- **Workshare DeltaView Main Window**, page 85, describes the Workshare DeltaView environment and provides an overview of the functionality available.
- **Working with Redline Documents**, page 93, describes the tools available to you when working with the compared (Redline) document after a comparison.
- **Configuring User Preferences**, page 104, describes how to configure user preferences, which define certain aspects of the way Workshare DeltaView works.

For information about comparing documents using Workshare Professional from within Microsoft Word, refer to *Chapter 7: Comparing Documents from within Microsoft Word*.

Overview

The Workshare DeltaView application compares two versions of a document – the original document and the modified document – and produces a comparison (Redline) document, enabling you to instantly see any differences between them. In one view, you can see both the original document and the comparison document.

Workshare DeltaView's powerful engine accurately and reliably displays document changes and eliminates the need to check the changes manually. You can review the Redline document by navigating between the changes. To make the review easier, you can customize how the changes are highlighted within the document. A statistical summary at the end of the Redline document enables you to precisely match the document changes.

Performing Comparisons

You can launch Workshare DeltaView both from within Microsoft Word and from your desktop.

You can compare your original document against a previous version of the document or against another document entirely. You can also compare any two versions of a document. For example, there may be ten versions of a document in your DMS. You can open version 3 and compare it against version 5.

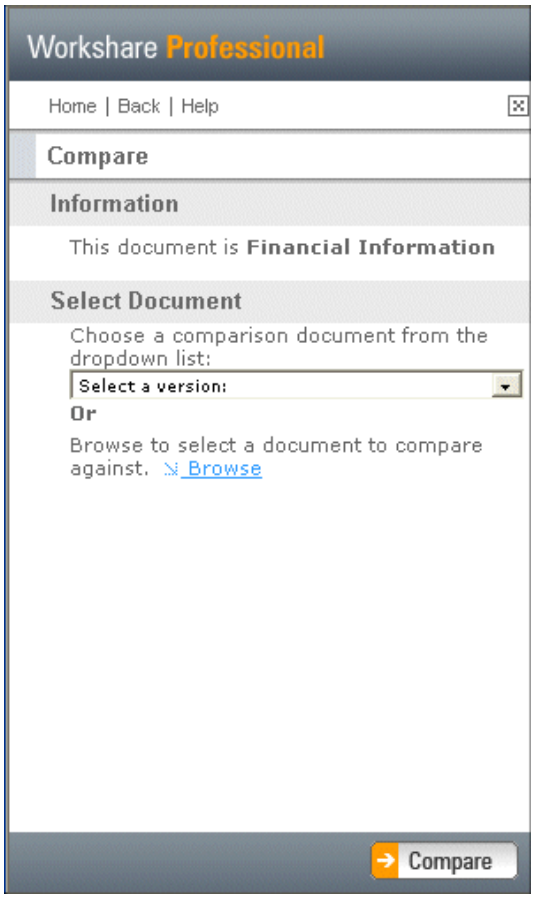
You can also use Workshare DeltaView to compare an email attachment with another document on your local file system or DMS.

Launching Workshare DeltaView from Microsoft Word

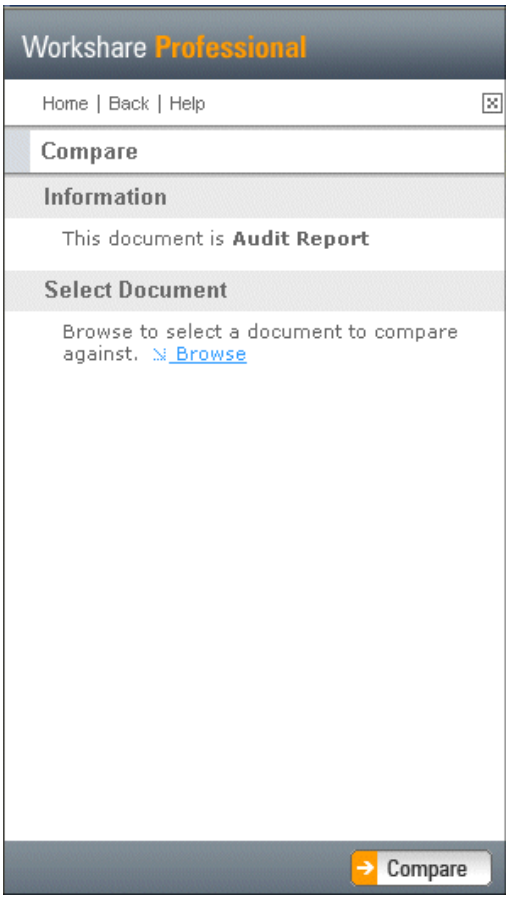
In this scenario, you first open your original document in Microsoft Word.

To compare documents:

1. From the *Workshare* menu, select **Compare Versions** or click **Compare** in the Home page of the Workshare Panel. The Compare page is displayed as follows:



When working with a DMS

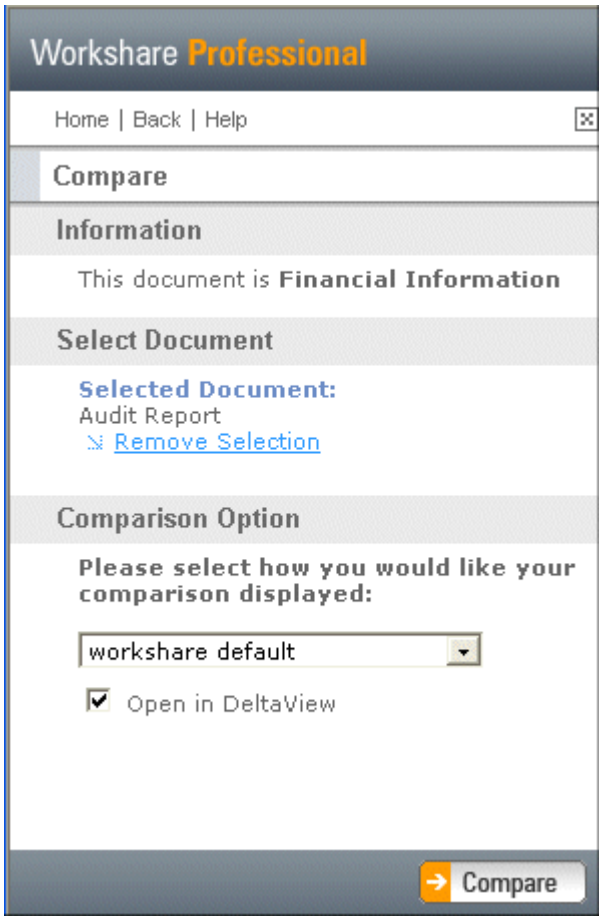


When not working with a DMS

2. Select the document against which you want to compare the open original document in one of the following ways:
   - Select a version of the document from the drop-down list. This option is only available when working with a DMS.

     NOTE: If you are working with a document not saved in your DMS, or that does not have previous versions, there may be a drop-down list of previous drafts of the same document that were sent for review.
   - Click **Browse** and select a document from your DMS or locally.

The Compare page is displayed as follows:



TIP! If you want to change the selected document, click the **Remove Selection** link and select a different document.

3. If required, select a rendering set from the drop-down list in the **Comparison Options** area to determine how the comparison document is displayed. For example, deleted text could be shown in ~~red with a strikethrough~~. For further information about rendering sets, refer to *Appendix B*: *Configuring Rendering Sets*.
4. Select the **Open in DeltaView** checkbox. Un-selecting this checkbox will compare your document from within Microsoft Word. Refer to *Chapter 6: Comparing Documents From Within Microsoft Word* for more information.
5. Click **Compare**. Workshare DeltaView performs the comparison. A progress bar indicates the progress of the compare process.

When the comparison is complete, the results of the comparison are displayed in the Workshare DeltaView window.

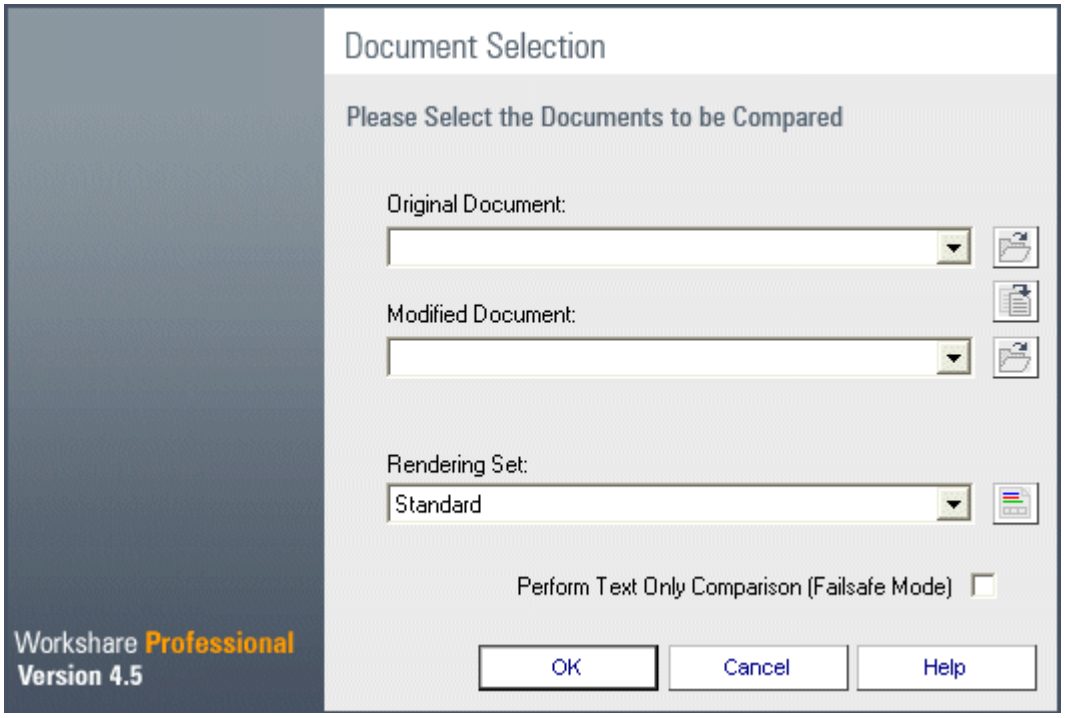
For a full description of the Workshare DeltaView interface, refer to *Workshare DeltaView Main Window*, page 85.

Launching Workshare DeltaView from your Desktop

In this scenario, you launch Workshare DeltaView as a standalone application from your desktop or the Start menu. You then select the documents you want to compare.

To compare documents:

1. Click the Workshare DeltaView shortcut on your desktop or from the Start menu, select **Programs** > **Workshare** > **Workshare Professional**> **Workshare DeltaView**. The *Document Selection* dialog box is displayed:



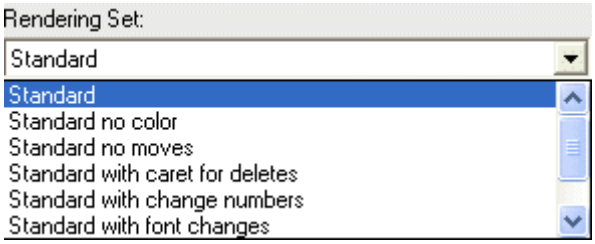
2. Select the original document you want to compare by clicking the **Open** button to the right of the **Original Document** field.
3. Navigate to the document location in your local file system or in your DMS and click **Open**. The selected document is displayed in the **Original Document** field.
4. Select the document you want to compare with the original document by clicking the **Open** button to the right of the **Modified Document** field.
5. Navigate to the document location in your local file system or in your DMS and click **Open**. The selected document is displayed in the **Modified Document** field.

TIPS!

If you want to compare a recently used file, click the drop-down in the **Original Document** and **Modified Document** fields and select the documents you want to compare. These lists contain the last 10 documents you have used.

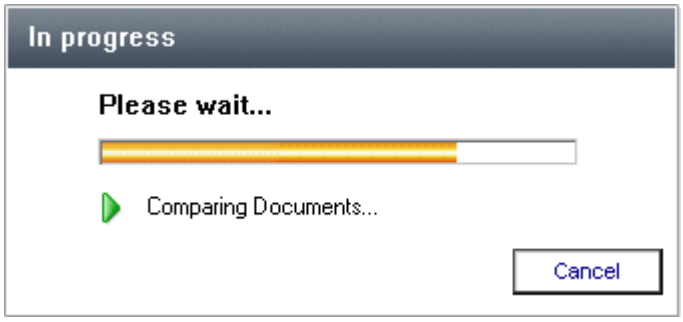
To swap the original and modified documents, click .

6. From the **Rendering Set** drop-down list, select the rendering set you want to use. Rendering sets contain a set of parameters that define how changes are displayed in the Redline (compared) document. You can select from the standard rendering sets provided with Workshare Professional or you can create and customize your own rendering sets (described in *Appendix B*: *Configuring Rendering Sets*).



NOTE: Clicking to the right of the **Rendering Set** field displays the Rendering Set Manager where you can create, modify and delete rendering sets. For a full description refer to *Appendix B: Configuring Rendering Sets*.

7. Click **OK**. The comparison process is launched and a Progress dialog box is displayed.



The Progress dialog box indicates the progress of the comparison.

When the comparison is complete, the Redline (compared) document is displayed in the Workshare DeltaView window. For a full description of the Workshare DeltaView interface, refer to *Workshare DeltaView Main Window*, page 85.

If Workshare Professional cannot complete the comparison, it will do one of two things:

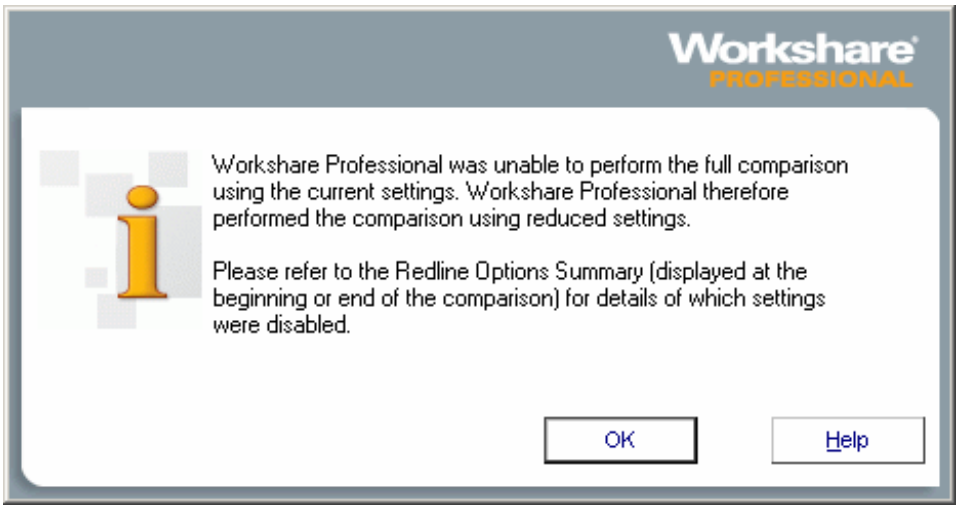
- If enabled, auto retry mode is invoked. See Auto Retry Mode, below.
- If auto retry mode is not enabled (or if Workshare Professional cannot complete the comparison in auto retry mode) failsafe mode is invoked. See Failsafe Mode, page 84.

Auto Retry Mode

If Workshare Professional is unable to complete the comparison, and auto retry mode is enabled, then Workshare Professional attempts to perform the comparison using reduced settings. For example, Workshare Professional may attempt to compare the documents without comparing field codes or without comparing footnotes. Workshare Professional repeatedly attempts to perform the comparison disabling settings one at a time until the comparison is successful.

NOTE: Auto retry mode is enabled in the Comparison Options page of the Rendering Set Manager. Refer to *Appendix B: Configuring Rendering Sets*.

Once the comparison is successful, the following message is displayed:


Workshare
PROFESSIONAL
Workshare Professional was unable to perform the full comparison using the current settings. Workshare Professional therefore performed the comparison using reduced settings.
Please refer to the Redline Options Summary (displayed at the beginning or end of the comparison) for details of which settings were disabled.
OK
Help

NOTE: The comparison may take longer that usual because Workshare Professional is attempting to compare using different settings.

Click **OK** and scroll to the Redline Options Summary, which is displayed at the beginning or end of the Redline document according to your settings in the Redline Options page of the Rendering Set Manager.

The Redline Options Summary indicates which settings Workshare DeltaView disabled in order to perform the comparison.

Redline Options Summary	
Option:	**Status:**
Redline Statistics at End of Document	ON
Include Redline Comparison Summary	OFF
Show Line Numbering	OFF
Show Change Numbers	OFF
Show Change Bars on Left	ON
Show Hidden Text	OFF
Detect List Numbering Changes	ON
Compare Headers/Footers	ON

Redline Options Summary	
Compare Footnotes	SET OFF
Display DeltaView Footers	OFF
Ignore Embedded Objects/Images	OFF
Compare at Character Level	OFF
Compare Numbers at Character Level	OFF
Show Moved Deletions	OFF
Show Changes to Spaces	OFF
Show Paragraph Changes	OFF
Ignore Case Changes	OFF
Ignore Textboxes	SET ON
Ignore Field Codes	OFF
Ignore Tables	OFF

NOTE: Even if you have not selected the **Include Reline Options Summary** parameter in the Redline Options page of the Rendering Set Manager, when Workshare DeltaView performs an auto retry, the Redline Options Summary is always displayed after the comparison.

The status indications are as follows:

ON This setting is selected and was applied during the comparison.

OFF This setting is not selected and was not applied during the comparison.

SET ON This setting was not selected but was enabled by Workshare DeltaView and applied during the comparison.

SET OFF This setting was selected but was disabled by Workshare DeltaView and not applied during the comparison.

NOTE: Workshare is continually developing and improving its software. To this end, if you are comparing documents and auto retry mode is invoked, Workshare is interested to analyze the documents concerned. Please forward the documents to Workshare Customer Support.

If Workshare DeltaView cannot complete the comparison even using reduced settings, failsafe mode is invoked.

Failsafe Mode

If Workshare DeltaView is unable to complete the comparison and auto retry mode is disabled, or if Workshare Professional cannot complete even a reduced comparison in auto retry mode, then failsafe mode is invoked. Failsafe mode means that Workshare DeltaView performs a text-only comparison, comparing only the text in a document and not the formatting or styles.

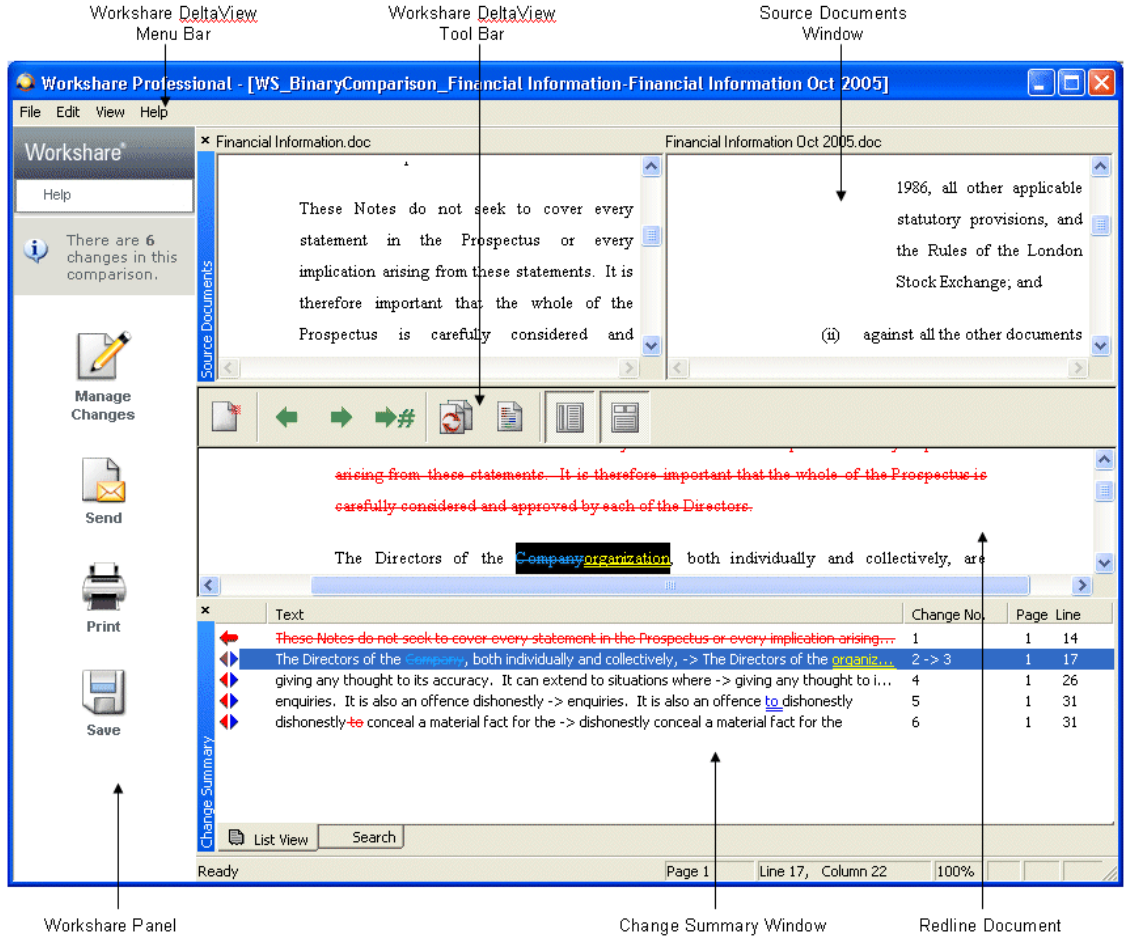
Manually Invoke Failsafe Mode

You can manually invoke failsafe mode so that a text only comparison is performed. You may want to do this if, after a full comparison, your Redline document was not fully shown in Workshare DeltaView for any reason. Additionally, you may want to do this if you are more interested to see text changes rather than formatting and style changes.

Before running the comparison, select the **Perform Text Only Comparison (Failsafe Mode)** checkbox in the *Document Selection* dialog box and then click **OK** to run the compare.

WORKSHARE DELTAVIEW MAIN WINDOW

The Workshare DeltaView main window enables you to view Redline documents - the results of a comparison between an original document and a modified document. You can view (in one work area) both source documents, the Redline document as well as a summary of the changes between the two source documents.


Workshare DeltaView Menu Bar
Workshare DeltaView Tool Bar
Source Documents Window
Workshare Professional - [WS_BinaryComparison_Financial Information-Financial Information Oct 2005]
File Edit View Help
Workshare
Help
There are 6 changes in this comparison.
Manage Changes
Send
Print
Save
Financial Information.doc
Financial Information Oct 2005.doc
These Notes do not seek to cover every statement in the Prospectus or every implication arising from these statements. It is therefore important that the whole of the Prospectus is carefully considered and
1986, all other applicable statutory provisions, and the Rules of the London Stock Exchange; and
(ii) against all the other documents
Source Documents
arising from these statements. It is therefore important that the whole of the Prospectus is carefully considered and approved by each of the Directors.
The Directors of the Company organization, both individually and collectively, are
Text
Change No.
Page
Line
These Notes do not seek to cover every statement in the Prospectus or every implication arising... 1 1 14
The Directors of the Company, both individually and collectively, -> The Directors of the organiz... 2 -> 3 1 17
giving any thought to its accuracy. It can extend to situations where -> giving any thought to i... 4 1 26
enquiries. It is also an offence dishonestly -> enquiries. It is also an offence to dishonestly 5 1 31
dishonestly to conceal a material fact for the -> dishonestly conceal a material fact for the 6 1 31
Change Summary
List View
Search
Ready
Page 1
Line 17, Column 22
100%
Workshare Panel
Change Summary Window
Redline Document

The name of the Redline document is displayed in the Workshare DeltaView title bar. The format is as follows: [WSComparison_(name of original document)-(name of modified document)]. Only one Redline document can be viewed in Workshare DeltaView at one time. The different areas of the Workshare DeltaView work area are described in the following sections.

Redline Document

The Redline document shows the results of the comparison between the original document and the modified document. Changes are marked according to the rendering set applied to the comparison. For example, deleted text could be red and struck through and added text could be blue and underlined.

You can navigate between the changes in the Redline document and edit the Redline document to take account of changes, if required. You can also save and print the Redline document as well as send it by email. All of these options are described in *Working with Redline Documents*, page 93.

Redline Summary

At the end of the Redline document, you can see a summary of the comparison and a list of the changes found.

Document comparison done by Workshare Professional on Monday, October 17, 2005 3:45:16 PM

Input:	
Document 1	file://C:/Documents and Settings/ciaranb/My Documents/Test Documents/Financial Information.doc
Document 2	file://C:/Documents and Settings/ciaranb/My Documents/Test Documents/Financial Information Oct 2005.doc
Rendering set	standard

Legend:	
Insertion	
~~Deletion~~	
~~Moved from~~	
Moved to	
Style change	
Format change	
~~Moved deletion~~	
Inserted cell	
Deleted cell	
Moved cell	
Split/Merged cell	
Padding cell	

Statistics:	
	Count
Insertions	3
Deletions	3
Moved from	0
Moved to	0
Style change	0
Format changed	0
Total changes	6

In order for the Redline document to include this summary, ensure that **Include Redline Summary** is selected in the Redline Options page of the Rendering Set Manager. Refer to *Appendix B: Configuring Rendering Sets*.

Redline Document Right-Click Menu

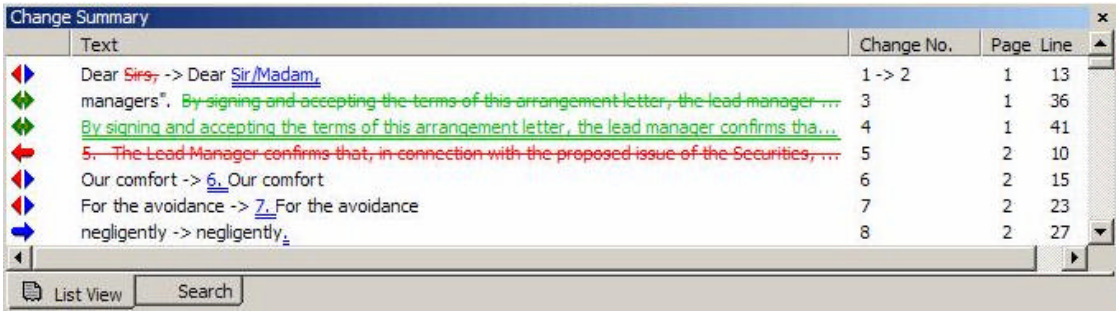
Right-clicking text or changes in the Redline document displays a popup menu, providing rapid access to some of the more commonly used tools.

Option	Description
Copy	Copies selected text to the clipboard.
Select All	Selects all the content of the Redline document.
Find	Opens the *Find* dialog box enabling you to search for specified text or keywords in the Redline document.
Find Next	When you have specified text or a keyword in the *Find* dialog box, navigates to the next occurrence of the specified search text or keyword in the Redline document.
Edit Redline	Opens the Redline document in Microsoft Word as an RTF file. You can then edit the Redline document as required. Refer to *Editing Redline Documents*, page 95.
Zoom	Enables you to change the display of the Redline document from 20% to 200% of its original size.
Link to Move	When text has been moved to another position, navigates and highlights the text in its new or previous position in the Redline document. When right-clicking text in its new position, clicking **Link to Move** highlights the text in its previous position. When right-clicking text in its original position, clicking **Link to Move** highlights the text in its new position. You must right-click a move-type change for this option to be available.
Link to Change	Jumps to the Redline Summary (at the end of the Redline document) highlighting the selected change. The **Include Redline Summary** option must be selected in the applied rendering set. Refer to *Appendix B: Configuring Rendering Sets*. You must right-click a change for this option to be available.

Change Summary Window

The **List View** tab of the Change Summary window displays all the changes between the original document and the modified document in the order that they occur.

Selecting a change in the Change Summary window highlights the change in the Redline document and displays the position of the change in both the source documents.



You can hide/display the Change Summary window by clicking in the Workshare DeltaView toolbar or by selecting **Document Change Summary** from the *View* menu.

TIP! The Change Summary window is by default positioned down the left side of the Workshare DeltaView environment. It can also float over the other windows. Click and drag the title bar of the Change Summary window to move it to a different location.

The following information is shown for each change in the Change Summary window:

Text	Details of the change.
Change No	The number of the change in the document. A change may have two numbers when it includes two actions. For example, a deletion and an addition.
Page Line	The page number and the line number in the original document where the change occurs.

The icons to the left of each change indicate the type of change as follows:

Red/blue arrow heads	Deletion and insertion on same line.
Green double-headed arrow	Moved text.
Red left-pointing arrow	Deleted text.
Blue right-pointing arrow	Inserted text.
Red double-headed arrow	Move/deletion - moved text, which includes a deletion.

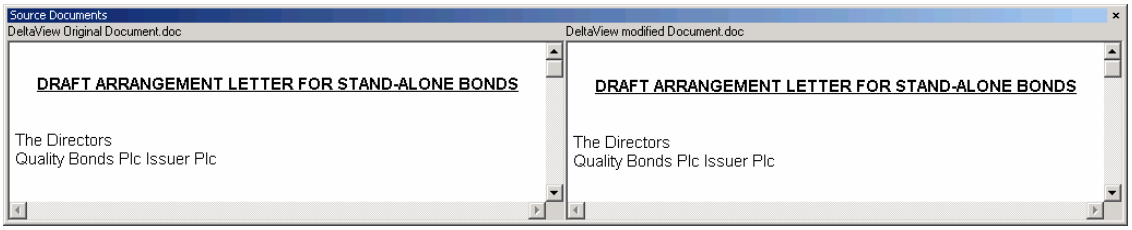
The **Search** tab enables you to search for changes in the Redline document that include a specific keyword or text. Refer to *Searching for Changes*, page 94.

Source Documents Window

The Source Documents window displays the original document and the modified document. You can scroll through both documents as required. Selecting a point in one source document automatically scrolls the other source document as well as the Redline document to the same point.

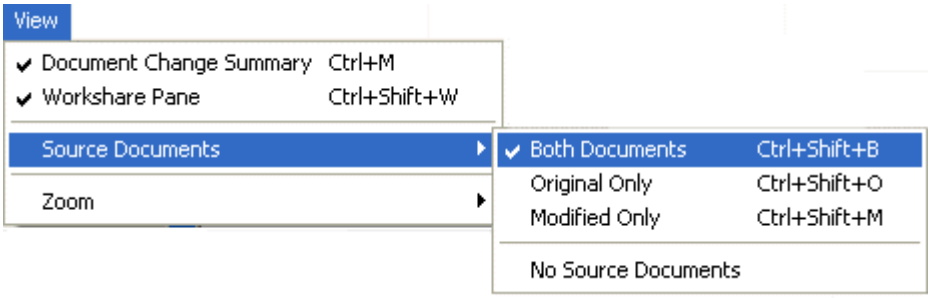
NOTE: In order for this automatic synchronization to occur, the **Synchronize Documents on Navigation** checkbox must be selected in the *User Preferences* dialog box. Refer to *Configuring User Preferences* page 104.

The source documents are read-only and cannot be modified in any way.



The name of the source document is shown above the document. The full path and document name is shown.

You can hide/display the Source Documents window by clicking in the Workshare DeltaView toolbar. You can display one or both of the source documents in the Source Documents window using the options in the *View* menu, as follows:



TIP! The Source Documents window is by default positioned across the top of the Workshare DeltaView environment. It can also float over the other windows. Click and drag the title bar of the Source Documents window to move it to a different location.

Source Documents Right-Click Menu

Right-clicking text in the original document or the modified document displays a popup menu, providing rapid access to some of the more commonly used tools.

Option	Description
Copy	Copies selected text to the clipboard.
Select All	Selects all the content of the original or modified document.
Find	Opens the *Find* dialog box enabling you to search for specified text or keywords in the original or modified document.
Find Next	When you have specified text or a keyword in the *Find* dialog box, navigates to the next occurrence of the specified search text or keyword in the original or modified document.
Zoom	Enables you to change the display of the original or modified document from 20% to 200% of its original size.

Workshare DeltaView Menu Bar

The Workshare DeltaView menu bar includes menus with the following options:

Menu	Option	Description
File	**New**	Opens the *Document Selection* dialog box enabling you to perform a new document comparison. Refer to page 81.
	Open	Enables you to open a saved document comparison. Comparisons are saved as Workshare DeltaFiles (.WDF).
	Close	Closes the current document comparison. You are prompted to save before closing.

Menu	Option	Description
	Manage Changes	Enables you to import the modified document into the original document and then accept or reject the changes proposed by the modified document as required. Refer to *Chapter 5: Managing Responses* for further information.
	Save Comparison	Enables you to save the current document comparison. Refer to *Saving Redline Documents*, page 96.
	Properties	Enables you to specify general information about the document comparison, such as title and author. The *Document Properties* dialog box includes no properties information from the original or modified documents.
	Print Comparison	Enables you to print the Redline document. Refer to *Printing Redline Documents*, page 99.
	Email To	Enables you to send the current documents (the original, the modified and the Redline) as email attachments. Refer to *Sending Compared Documents by Email*, page 96.
	Preferences	Includes the following sub-options:
	User Preferences	Opens the *User Preferences* dialog box where you can specify parameters affecting how Workshare DeltaView works, for example, whether source and Redline documents are synchronized when navigating. Refer to *Configuring User Preferences*, page 104.
	Edit Rendering Set	Opens the Rendering Set Manager where you can apply different rendering sets to a comparison and, if you have permission, you can add, edit and delete rendering sets. Refer to *Appendix B: Configuring Rendering Sets*.
	Workshare Professional Configuration	Opens the Workshare Configuration Manager where, if you have permission, you can configure Workshare Professional, for example, the way it interacts with your DMS and email client. Refer to the *Workshare Professional Administration Guide*.
	Exit	Exits the Workshare DeltaView application. You are prompted to save the current comparison before exiting.
Edit	**Copy**	Copies selected text to the clipboard.
	Select All	Selects all the content of the currently active document. For example, if the cursor is in the Redline document, all content of the Redline document is selected.
	Find	Opens the *Find* dialog box enabling you to search for specified text or keywords in the currently active document.

Menu	Option	Description
	Find Next	When you have specified text or a keyword in the *Find* dialog box, navigates to the next occurrence of the specified search text or keyword in the currently active document.
	Edit Redline	Opens the Redline document in Microsoft Word as an RTF file. You can then edit the Redline document as required. Refer to *Editing Redline Documents*, page 95.
View	**Document Change Summary**	Displays/hides the Change Summary window.
	Workshare Panel	Displays the Workshare Panel down the left side of the window.
	Source Documents	Displays/hides the Source Documents window. You can display the original document only, the modified document only, both source documents or none at all.
	Zoom	Enables you to change the display of all displayed documents from 20% to 200% of their original size.
Help	**Help Topics**	Provides access to online help.
	User Manual	Displays this user guide.
	Workshare Professional Home Page	Displays the Workshare home page in your browser.
	Keyboard Shortcuts	Displays a list of keyboard shortcuts available in Workshare DeltaView.
	About Workshare Professional	Displays version information about Workshare DeltaView.

Workshare DeltaView Toolbar

The Workshare DeltaView toolbar includes the following buttons:

Button	Description
	Opens the *Document Selection* dialog box enabling you to perform a new document comparison. Refer to page 81.
	Navigates to the previous change and highlights the entire change in the Redline document. Refer to *Navigating Between Changes*, page 93.
	Navigates to the next change and highlights the entire change in the Redline document. Refer to *Navigating Between Changes*, page 93.
	Enables you to navigate to a specific change number. The entire change is highlighted in the Redline document. Refer to *Navigating to a Specific Change*, page 94.
	Swaps the original and modified documents. Refer to *Swapping the Source Documents*, page 95.

Button	Description
	Opens the Rendering Set Manager where you can apply different rendering sets to a comparison and, if you have permission, you can add, edit and delete rendering sets. Refer to *Appendix B: Configuring Rendering Sets*.
	Displays/hides the Change Summary window.
	Displays/hides the Source Documents window.

WORKING WITH REDLINE DOCUMENTS

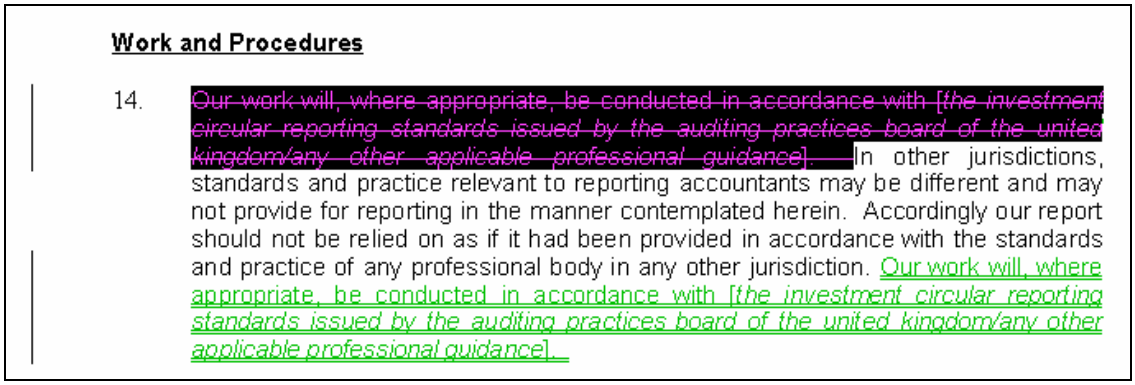
This section describes the tools available to you when working with the compared (Redline) document after a comparison.

Navigating Changes

After performing a comparison, you can review the Redline document (the result of the comparison) and consider the changes between the original and modified documents. You can move between changes in the Redline document by jumping from change to change or searching for a specific change using change numbers or keywords.

Navigating Between Changes

Selecting a change in the Change Summary window highlights the change in the Redline document and displays the position of the change in both of the source documents.


Work and Procedures
14.
Our work will, where appropriate, be conducted in accordance with [the investment circular reporting standards issued by the auditing practices board of the united kingdom/any other applicable professional guidance].
In other jurisdictions, standards and practice relevant to reporting accountants may be different and may not provide for reporting in the manner contemplated herein. Accordingly our report should not be relied on as if it had been provided in accordance with the standards and practice of any professional body in any other jurisdiction. Our work will, where appropriate, be conducted in accordance with [the investment circular reporting standards issued by the auditing practices board of the united kingdom/any other applicable professional guidance].

NOTE: In order for this automatic synchronization to occur, the **Synchronize Documents on Navigation** checkbox must be selected in the *User Preferences* dialog box. Refer to *Configuring User Preferences*, page 104.

Click **Previous** in the Workshare DeltaView toolbar to move to the previous change and highlight the entire change in the Redline document.

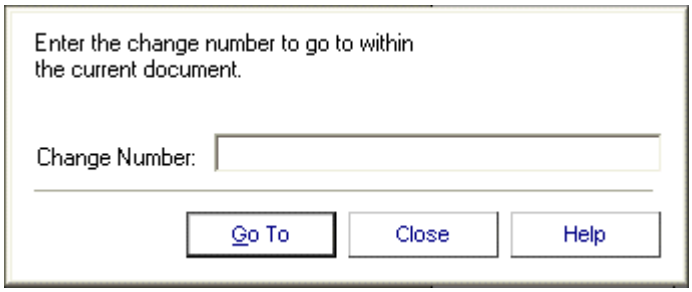
Click **Next** in the Workshare DeltaView toolbar to move to the next change and highlight the entire change in the Redline document.

Navigating to a Specific Change Number

Changes are allocated numbers, which are displayed next to the change in the Change Summary window. A change may have two numbers when it includes two actions, for example, a deletion and an addition. You can move to a specific change number in the Redline document.

To navigate to a specific change number:

1. Click in the Workshare DeltaView toolbar. The following dialog box is displayed:



2. In the **Change Number** field, enter the number of the change you want to display in the Redline document.
3. Click **Go To**. The entire change is highlighted in the Redline document.
4. Repeat steps 2 and 3 to navigate to further changes as required.
5. Click **Close** to close the dialog box.

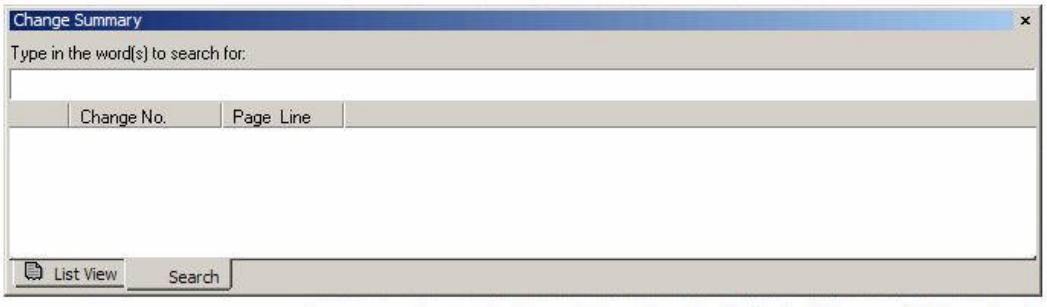
TIP! To maximize this feature, apply a rendering set with the **Show Change Numbering** checkbox selected in the Change Numbering Format page. Refer to *Appendix B: Configuring Rendering Sets*. This shows all the change numbers against each change in the Redline document Dear ~~Sirs,~~[1]Sir/Madam,[2]

Searching for Changes

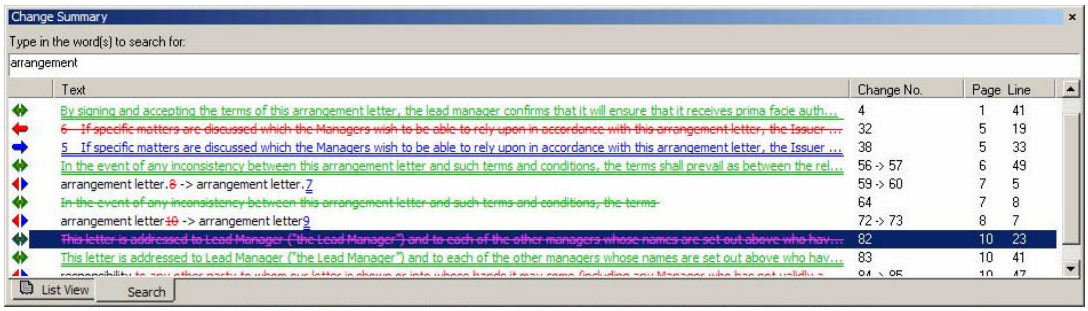
You can search for changes in the Redline document that include a specified keyword or text.

To search for a change:

1. In the Change Summary window, select the **Search** tab.



2. In the upper text box, enter the search criteria – the word or words for which you want to search, and press **Enter** on your keyboard. A list of changes that include the specified word or words is displayed in the lower text area.



NOTE: Workshare DeltaView only searches the changes for the specified text. It does not search the text of the original or modified documents. To search the entire text of the original, modified or Redline documents, use the **Find** and **Find Next** options in the *Edit* menu.

3. Repeat step 2 to run another search if required.

Swapping the Source Documents

You can re-run a comparison exchanging the original document for the modified document and the modified document for the original document. For example, if you selected Document A as the original document and Document B as the modified document, Workshare DeltaView compares Document A to Document B and presents the changes made to Document A. You can then swap the original and modified documents so that Document B is now the original document and Document A is the modified document. Workshare Professional automatically re-runs the comparison, comparing Document B to Document A, and presents the changes made to Document B.

To swap the source documents:

Click in the Workshare DeltaView toolbar to swap the source documents. Workshare DeltaView automatically runs a new comparison, using the modified document as the original document and the original document as the modified document. The new Redline document is displayed in the Workshare DeltaView main window.

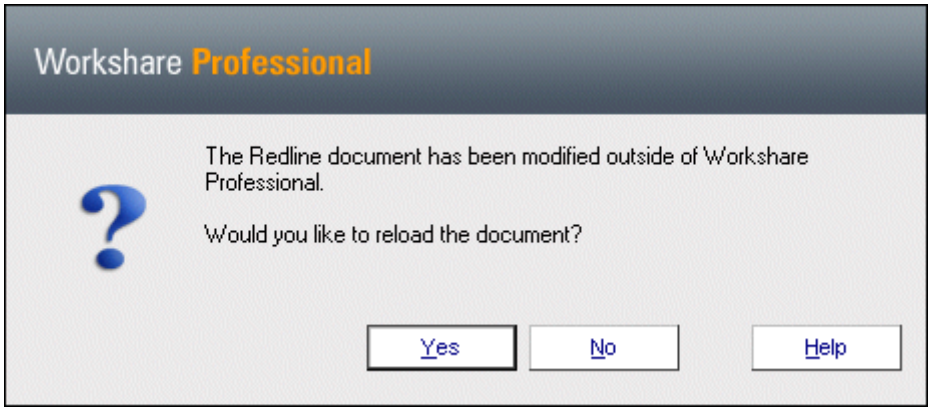
Editing Redline Documents

In order to edit the Redline document, you can open it in Microsoft Word and use all standard Microsoft Word functionality to edit the document as required.

To edit the Redline document:

1. From the *Edit* menu in the Workshare DeltaView main window, select **Edit Redline**. The Redline document is opened in Microsoft Word as an RTF file with the default name Redline.rtf. All the changes are displayed.
2. Edit the Redline document as required.

3. Click **Save** to save the document. By default, Redline.rtf is saved in a temporary folder. Do not change the name or location. In Workshare DeltaView the following message is displayed:



4. Click **Yes** to replace the displayed Redline document with your modified Redline document.

NOTE: In order for Workshare Professional to recognize the changes that you made to the Redline document, you must leave the Redline document with its default name (Redline.rtf) in its default temporary folder. However, for your own purposes, you can also use **Save As** to save the modified Redline document as a Microsoft Word file (or other format) and in a different location, as required.

If you re-compare the original and modified documents, any changes made to the Redline document are lost. In order to save any changes made to the Redline document, you must save it.

Importing Changes into the Original Document

You can import the changes detailed in the Redline document into the original document.

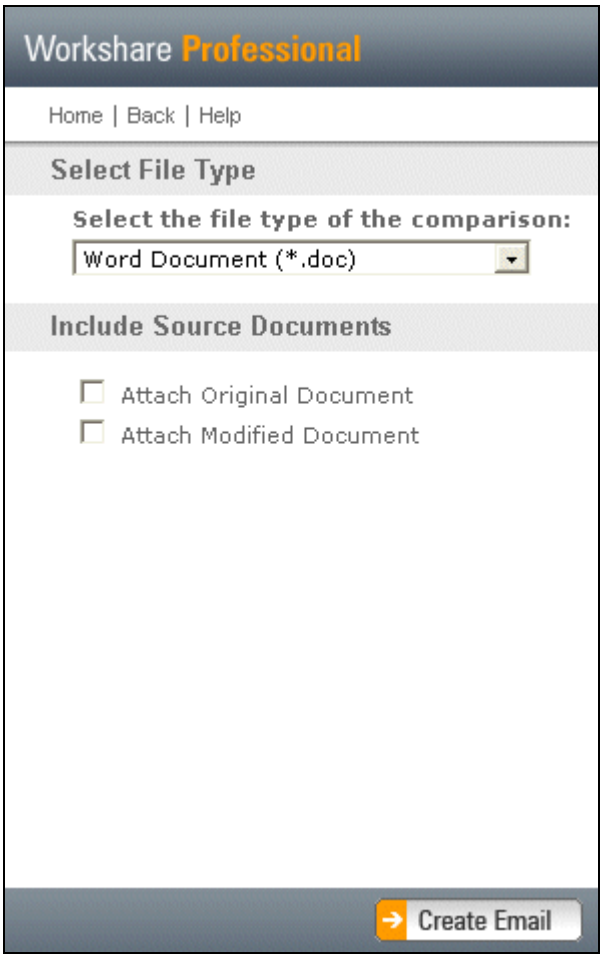
From the *File* menu in the Workshare DeltaView main window, select **Manage Changes** or click **Incorporate Changes** in the Workshare Panel. The changes detailed in the Redline document are imported into the original document. The original document and the Manage Changes page of the Workshare Panel are displayed. You can then select to incorporate the changes into the original document as required. Refer to *Chapter 5: Managing Responses* for further details.

Sending Compared Documents by Email

Workshare Professional integrates with your email system. You can send the Redline document as well as the original and modified documents as email attachments.

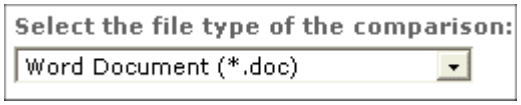
To send compared documents by email:

1. In the Workshare Panel, click **Email** or from the *File* menu in the Workshare DeltaView main window, select **Email To**. The Workshare Panel displays the Email Comparison page as follows:



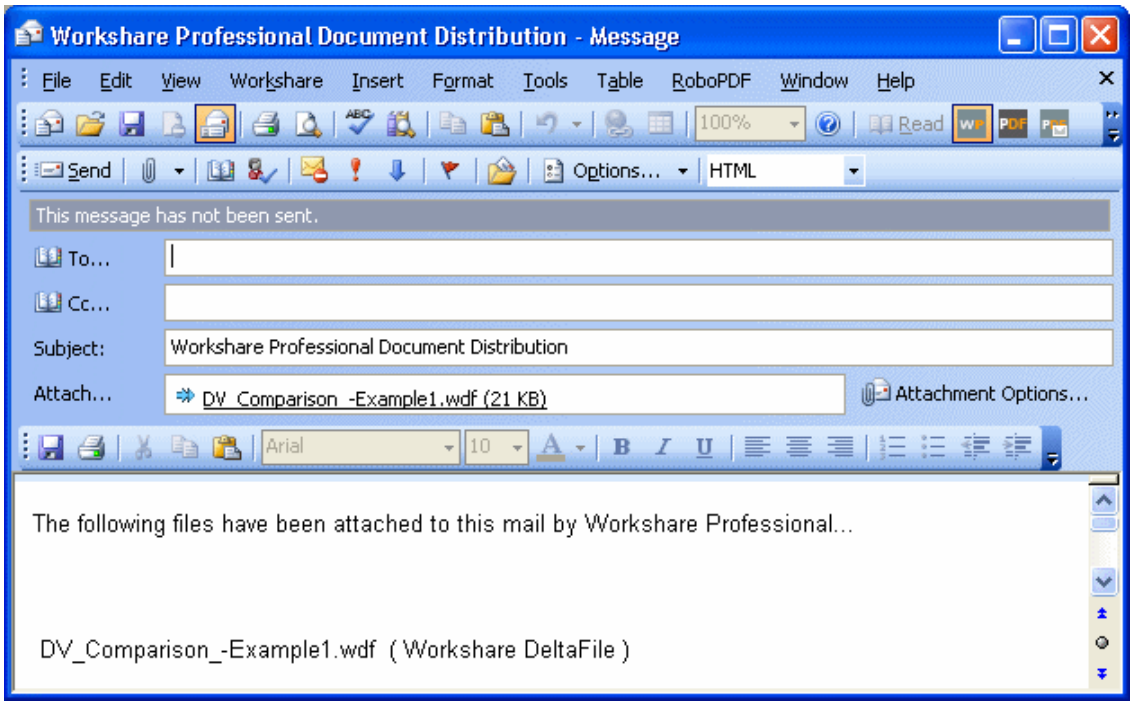
2. Select the format in which you would like to send the Redline document from the drop-down list.
   - If you select WDF, the Workshare Panel is displayed as above. Selecting this option sends the compared documents as a DeltaFile. A DeltaFile contains the Redline document and a reference to the original and modified documents in the DMS. A DeltaFile can only be opened in Workshare DeltaView. The file extension for a DeltaFile is .WDF.
   - If you select PDF, the Workshare Panel is displayed as follows:

     Select whether you want to attach the original or modified document (in DOC format) to the email. Also, you can specify security options for the Redline PDF if required.
   - If you select any other format, the Workshare Panel is displayed as follows:



Select whether you want to attach the original or modified document (in DOC format) to the email.

3. Click **Create Email**. An email message window is displayed with the selected files as attachments.


Workshare Professional Document Distribution - Message
File Edit View Workshare Insert Format Tools Table RoboPDF Window Help
Send Options... HTML
This message has not been sent.
To...
Cc...
Subject: Workshare Professional Document Distribution
Attach... DV_Comparison_-Example1.wdf (21 KB) Attachment Options...
The following files have been attached to this mail by Workshare Professional...
DV_Comparison_-Example1.wdf (Workshare DeltaFile)

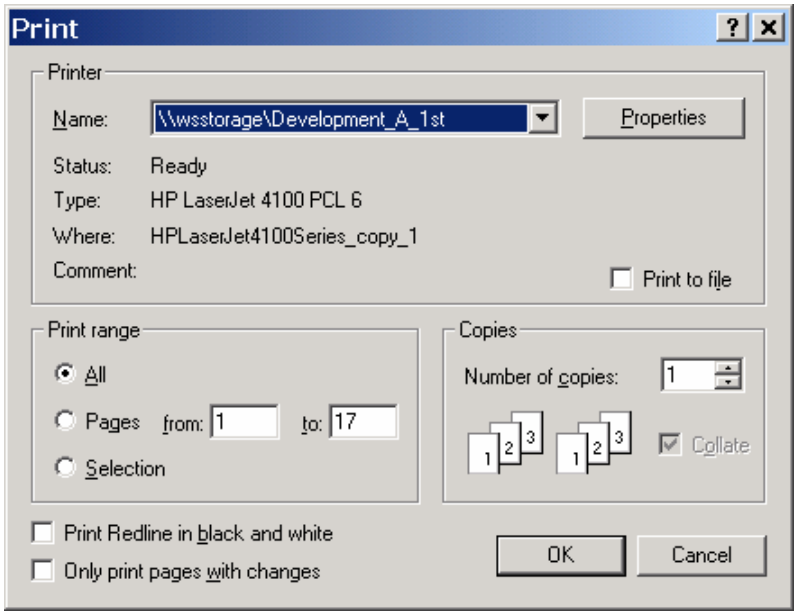
4. Enter the recipient(s) name and any other text you want to include and click **Send**.

Printing Redline Documents

You can print the Redline document at any time.

To print the Redline document:

1. From the *File* menu in the Workshare DeltaView main window, select **Print Comparison** or click **Print** in the Workshare Panel. The *Print* dialog box is displayed.



2. Select from the standard print options in the usual way.
3. If you are printing to a black and white printer, select the **Print Redline in black and white** checkbox, as color text may not appear clearly when printing in black and white.
4. If you only want to print pages of the Redline document that include changes, select the **Only print pages with changes** checkbox.
5. Click **OK**.

Saving Redline Documents

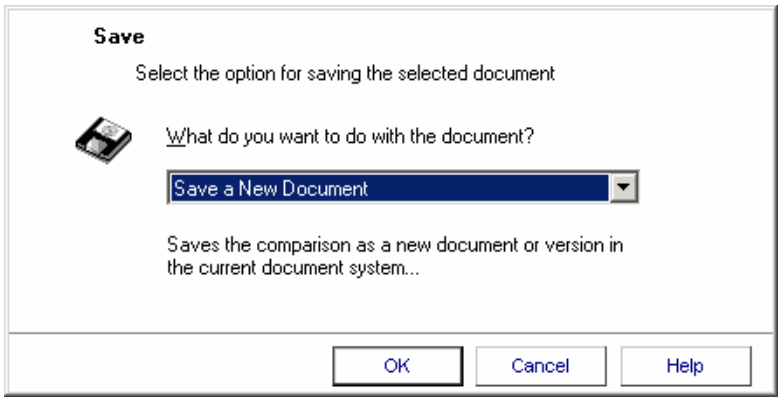
You can save the comparison as a Workshare Professional DeltaFile (.WDF), which contains all three documents (original, modified and Redline). You can also save just the Redline document as a DOC, RTF, HTML, TXT or PDF file.

You can save the Redline document to your DMS or locally. The following procedure describes how to save to DOCS Open as an example.

To save the Redline document:

1. From the *File* menu in the Workshare DeltaView main window, select **Save Comparison** or click **Save** in the Workshare Panel. The *Save Document* dialog box is displayed.

NOTE: Clicking **Save Comparison** when you work with a DMS starts the DMS. To save locally, hold the **Shift** key down when clicking **Save Comparison**.

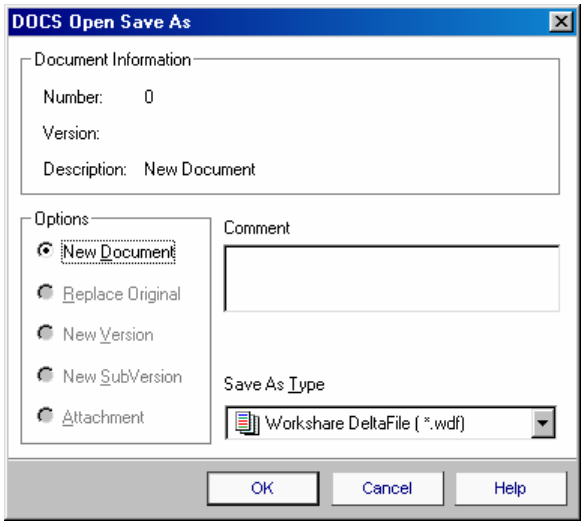

Save
Select the option for saving the selected document
What do you want to do with the document?
Save a New Document
Saves the comparison as a new document or version in the current document system...
OK
Cancel
Help

NOTE: When saving a Redline document locally, the *LocalStore Save As* dialog box is displayed where you can navigate to the location where you want to save the file and enter a name for the file.

2. From the drop-down list, select how you want to save the document from the following:
   - **Save a New Document**
   - **Attach/Relate to Original Document** (Only available when using the Interwoven or DOCS Open integration and the original document is from Interwoven or DOCS Open)
   - **Attach/Relate to Modified Document** (Only available when using the Interwoven or DOCS Open integration and the modified document is from Interwoven or DOCS Open)

NOTE: The modified document is the current document open in Microsoft Word; the original document is the document selected to compare against the current document.

3. Click **OK**. The *DOCS Open Save As* dialog box is displayed.



The **Document Information** area provides information about the currently open Redline document, if it is already saved. This information includes the DMS document number, the version number and a description. If the Redline document is a new document these fields are empty.

4. In the **Options** area, select the way in which you want to save the Redline document from the following:

New Document	To save the Redline document as a completely new document. If the Redline document has not been saved before and you selected **Save a New Document** in the *Save Document* dialog box, this is the only option enabled.
Replace Original	To replace the original document of the comparison with the Redline document. This option is only enabled if the Redline document has been saved before and you selected **Save a New Document** in the *Save Document* dialog box.
New Version	To save the Redline document as a new version. This option is only enabled if the Redline document has been saved before and you selected **Save a New Document** in the *Save Document* dialog box.
Related Document	(Interwoven DMS only) To save the Redline document as a related document (related to the original or modified document). This option is only enabled if you selected **Attach/Relate to Original/Modified Document** in the *Save Document* dialog box.
New Sub Version	(Hummingbird DMS only) To save the Redline document as a new sub-version. This option is only enabled if the Redline document has been saved before and you selected **Save a New Document** in the *Save Document* dialog box.
Attachment	(Hummingbird DMS only) To save the Redline document as an attachment to the original or modified document. This option is only enabled if you are attaching a Redline document to the original or modified document, meaning you selected **Attach/Relate to Original/Modified Document** in the *Save Document* dialog box.

5. (Interwoven DMS only) From the **Logged in Servers** drop-down list, select which server you would like to use. This list is a list of previously logged in servers. If you want to log in to a different server, click **Servers**.

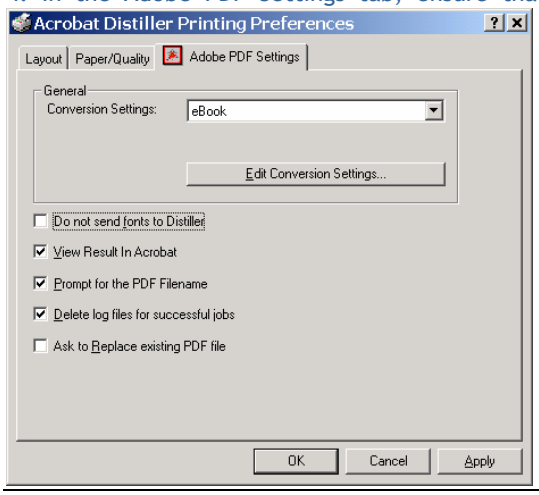
6. From the **Save As Type** drop-down list, select the format for the saved file from the following:

Workshare Professional DeltaFile (*.wdf)	Saves both the Redline document and the source documents as a Workshare Professional DeltaFile. This file can only be opened in Workshare Professional DeltaView.
Word Document (*.doc)	Saves the Redline document as a Microsoft Word file. The source documents are not saved.
Text Only (*.txt)	Saves the Redline document as a text file. The source documents are not saved.
Rich Text Format (*.rtf)	Saves the Redline document as an RTF file. The source documents are not saved.
HTML Document (*.htm)	Saves the Redline document as a HTML document. The source documents are not saved.

Adobe Acrobat File (*.pdf)	Saves the Redline document as a PDF file. The source documents are not saved. You can only save as a PDF file and this option will only be available if you have Adobe Acrobat Distiller installed.

NOTE: In order to save as a PDF, you must ensure that the **Do not send fonts to Distiller** property for the Distiller printer is deselected. To check this:

1. Select **Settings** and then **Printers** from the Start menu.
2. Right-click **Acrobat Distiller** and select **Properties**.
3. In the **General** tab, click **Printing Preferences**.
4. In the Adobe PDF Settings tab, ensure that **Do not send fonts to Distiller** is deselected.



7. Click **OK**. The standard DOCS Open save dialog box is displayed.
8. Complete the fields as required and click **OK**.

TIPS and NOTES:

Not all formats are always available. The administrator may have disabled some formats.

You cannot save different versions of a DOCS Open document in different formats. For example, if you have chosen to save a comparison as a Workshare Professional DeltaFile then all subsequent versions of that comparison must be saved in Workshare Professional DeltaFile format.

If the administrator has restricted the save format, and the base document is of a different type to the administrator-defined format, the DOCS base document type will take precedence. For example, if the administrator has restricted the save format to RTF. If you try and save a Redline document as a version of the original or modified document, the version created is saved in Microsoft Word format rather than the administrator-defined RTF format.

For newly profiled documents, the file format chosen determines the application ID that will be used on the DOCS profile. For Workshare Professional DeltaFile format, DELTAVIEW is used and for Microsoft Word and Rich Text Format, MS WORD is used.

If the comparison has been saved as an attachment (both rich text format and Workshare DeltaFile files) you can only retrieve it by right-clicking the original or modified document and selecting **Compatible Apps...**.

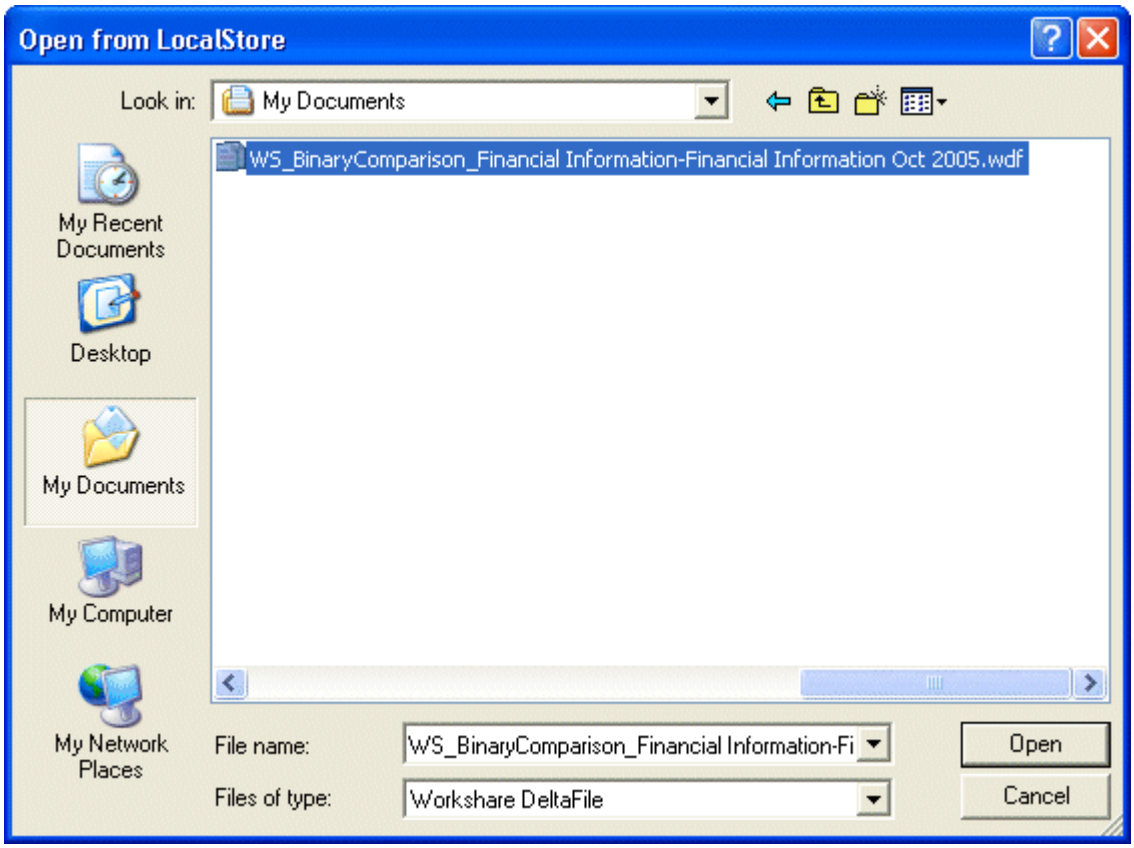
Opening Saved Workshare Professional DeltaFiles

When a comparison has been saved as Workshare DeltaFile, you can open it from Workshare DeltaView.

To open a saved comparison:

1. From the *File* menu in the Workshare DeltaView main window, select **Open**. An *Open* dialog box is displayed.

NOTE: Clicking **Open** when you work with a DMS starts the DMS. To open from a local or network drive, hold the **Shift** key down when clicking **Open**.



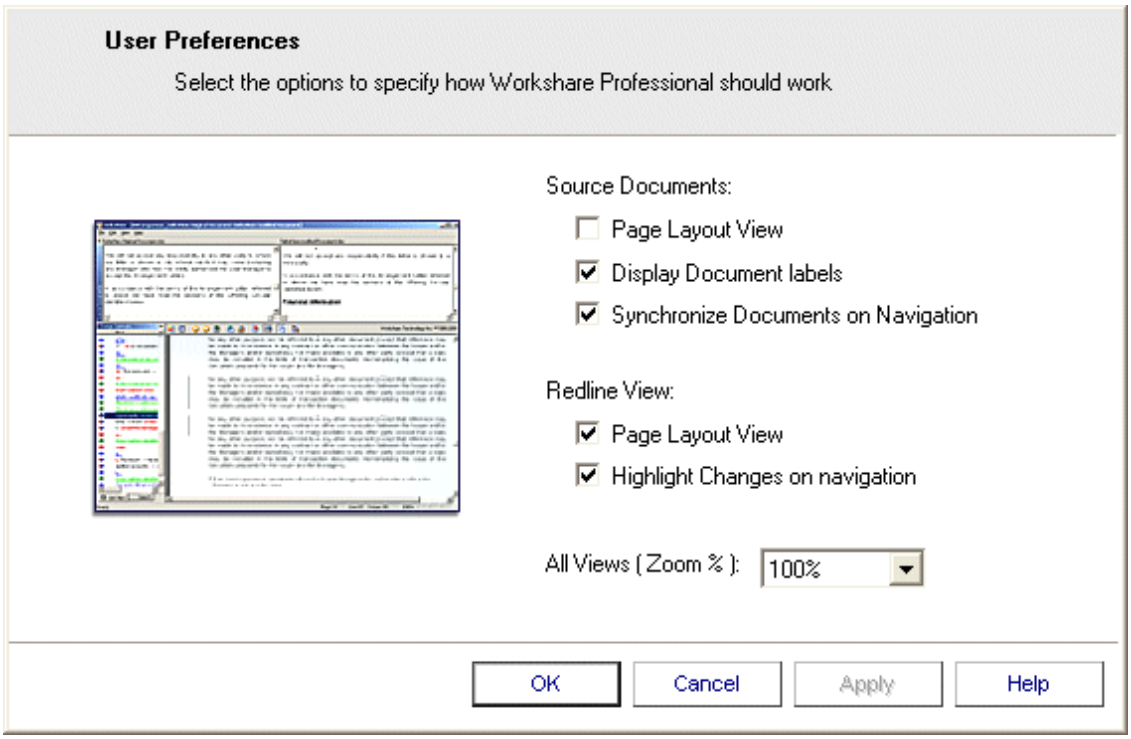
2. Navigate to the location where the comparison is saved and select the WDF file you want to open.
3. Click **Open**. The selected comparison is opened in Workshare DeltaView. The source documents and the Redline document are displayed.

CONFIGURING USER PREFERENCES

User preferences define the behavior of Workshare DeltaView in certain circumstances. For example, you can specify the view of the source documents and the Redline document.

To configure user preferences:

1. From the *File* menu in the Workshare DeltaView main window, select **Preferences** and then **User Preferences**. The *User Preferences* dialog box is displayed:



2. Select and deselect options as required. The options available are as follows:

Parameter	Description
Source Documents	
Page Layout View	If selected, the source documents are displayed in page layout view.
Display Document labels	If selected, the names of the original and modified documents are displayed above them.
Synchronize Documents on Navigation	If selected, clicking a paragraph in any document scrolls all three documents (original, modified and Redline) to that point.
Redline View	
Page Layout View	When selected, the Redline document is displayed in page layout view.
Highlight Changes on navigation	When selected, changes are highlighted in the Redline document when you navigate to them. For example, by selecting a change in the Change Summary window.

Parameter	Description
All Views (Zoom %)	Enables you to select the magnification of the source documents and the Redline document as they appear in the Workshare Professional DeltaView main window. You can select from 25% to 200%.

3. Click **OK**.

Chapter 8: Managing Content Risk in Documents

This chapter describes how to view and navigate through the track changes, comments and footnotes that may have been added to a document. Additionally, you can display a report of all the content risk in a document and remove selected content risk from a document. It includes the following sections:

- **Overview**, below, introduces the ways in which Workshare Professional enables you to protect documents by viewing and removing sensitive content risk.
- **Displaying Content Risk in Microsoft Word**, page 106, describes how to discover all content risk in a Microsoft Word document.
- **Displaying Content Risk in Microsoft Excel and PowerPoint**, page 108, describes how to discover all content risk in a Microsoft Excel or PowerPoint document.
- **Cleaning Hidden Data**, page 108, describes how to remove selected types of hidden data from a document.

Overview

Workshare Professional provides a window into a document's content risk and enables you to produce a detailed report of all the content risk in a document. Conntent risk is comprised of hidden data and content policy violations. Hidden data includes information such as author's name, keywords, routing slips and authoring trails. Content policy violations include sensitive privacy, intellectual property and financial disclosure information. Revealing the content risk in this way, Workshare Professional alerts you to the possibility of accidentally emailing confidential information that is stored in a Microsoft Word, Excel or PowerPoint document. Workshare Professional alerts you to content policy violations and allows you to remove selected hidden data from a document if required.

When a document is published, extra care has to be taken to ensure that no unwanted information remains.

Displaying Content Risk in Microsoft Word

Workshare Professional integrates with Microsoft Word to provide an option to discover and view content risk in a document. Content risk can include both of the following:

- Track changes, comments and footnotes.
- Administrator-defined content risk. For example, document properties, such as title, subject and author.

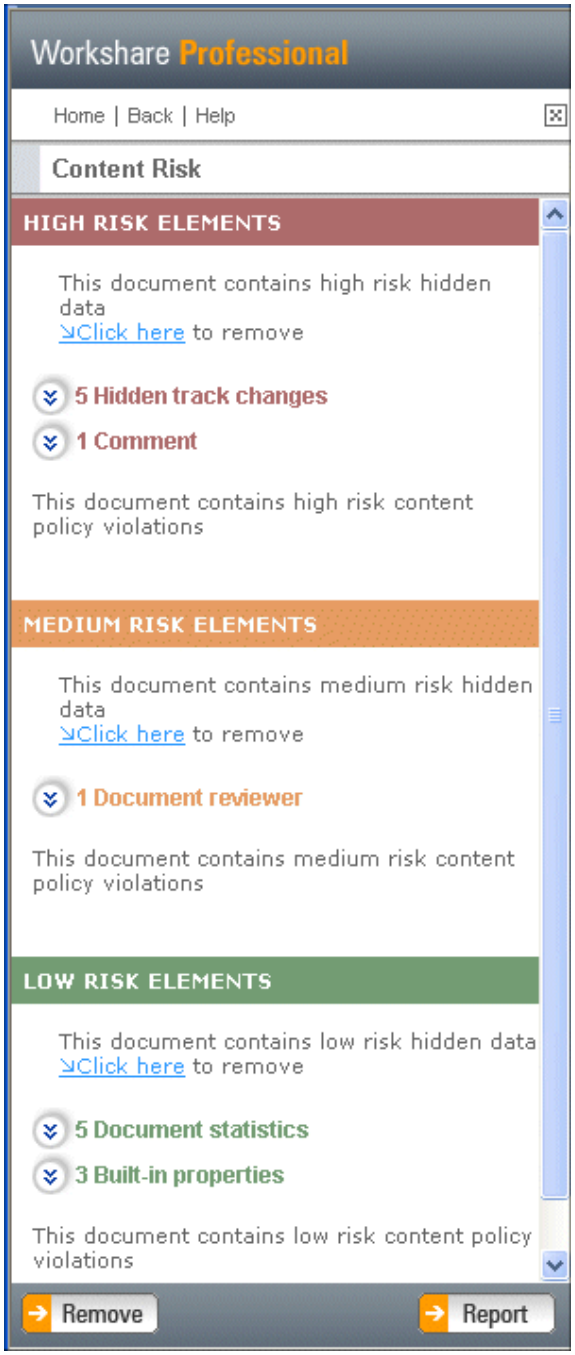
You can display a comprehensive report of all the content risk in a document.

To discover content risk in your Microsoft Word document:

1. Open your document in Microsoft Word and select **Show Content Risk** from the *Workshare* menu, or click **Content Risk** in the Home page of the Workshare Panel. You can also click **Content Risk** from other pages in the Workshare Panel.

   NOTE: The document must be saved in order for Workshare Professional to discover content risk. If you have not saved your document, a message is displayed prompting you to save. Click **Yes**.

Workshare Professional queries the document to determine the content risk contained in the document. This process may take a few moments if your document is large or if it contains large amounts of content risk. Once the discovery process is complete, the Content Risk page of the Workshare Panel is displayed showing a summary of the content risk found.


Workshare Professional
Home | Back | Help
Content Risk
HIGH RISK ELEMENTS
This document contains high risk hidden data
Click here to remove
5 Hidden track changes
1 Comment
This document contains high risk content policy violations
MEDIUM RISK ELEMENTS
This document contains medium risk hidden data
Click here to remove
1 Document reviewer
This document contains medium risk content policy violations
LOW RISK ELEMENTS
This document contains low risk hidden data
Click here to remove
5 Document statistics
3 Built-in properties
This document contains low risk content policy violations
Remove
Report

NOTES: You can click **Report** to create a risk report that provides a full account of the different types of content risk in a document. Refer to *Chapter 12: Creating Reports*.

The content risk found is divided into high risk, medium risk and low risk. In each category, the content risk is listed by type. For example, hidden text, fields, and statistics.

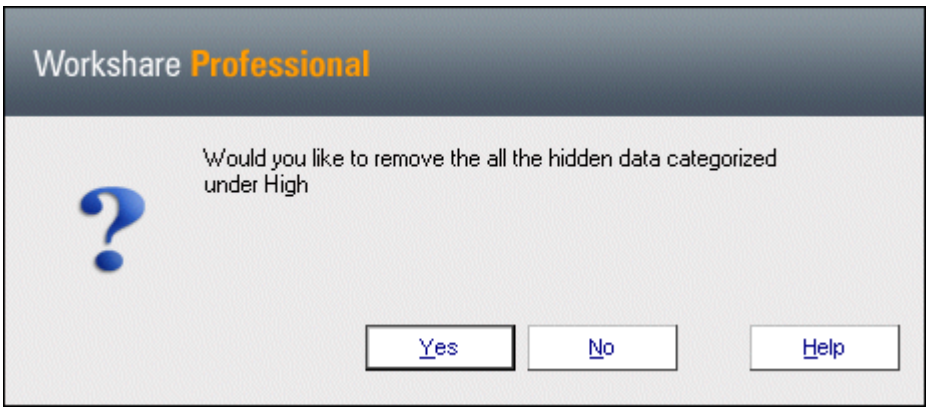
2. To display details of the content risk found, click to the left of a content risk type.

6 Hidden track changes
- organization (Insertion by Ciaran Brennan)
- Company (Deletion by Ciaran Brennan)
- The makers of a statement contained in t
Prospectus may be liable to potential
investors if it can be shown that they mad
a false statement in the Prospectus
intentionally, recklessly or even negligentl
or, in some circumstances, innocently and
the investor was induced to acquire an
interest in the Company as a
result. (Insertion by Ciaran Brennan)

NOTE: Workshare Professional is configured by default to display a maximum of 100 track changes. Please consult with your administrator if you require this limit to be increased.

3. To delete an entire category of hidden data, click the

link in the category. A confirmation dialog box is displayed. For example, if you clicked the link in the high risk category, the following dialog box is displayed:



4. Click **Yes**. The hidden data is removed from the document and the Content Risk page of the Workshare Panel is redisplayed showing the new details of the content risk in the document.

Displaying Content Risk in Microsoft Excel and PowerPoint

Workshare Professional integrates with Microsoft Excel and PowerPoint to provide an option to discover and view content risk in a document. Content risk can include both of the following:

- Track changes, comments and footnotes.
- Administrator-defined content risk. For example, document properties, such as title, subject and author.

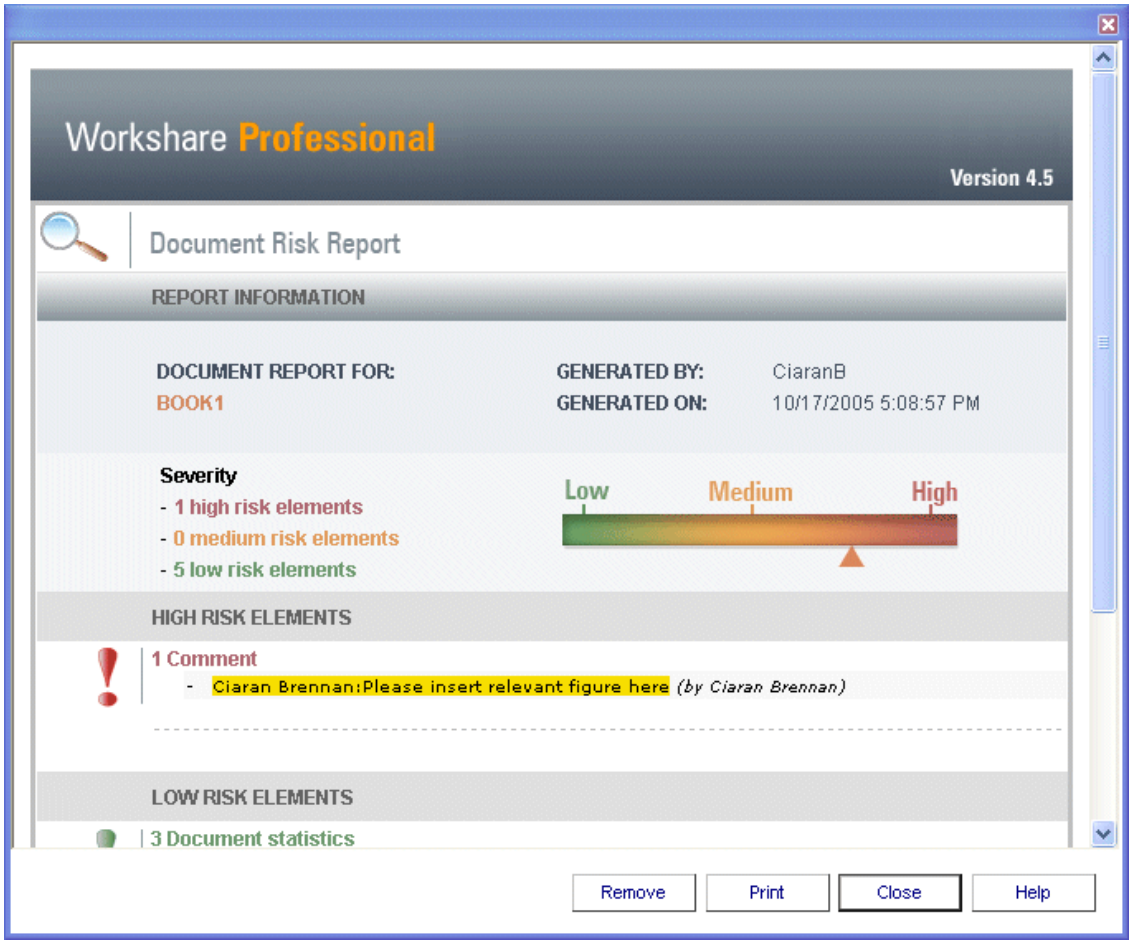
You can display a comprehensive report of all the content risk in a document.

To discover content risk in your Microsoft Excel or PowerPoint document:

1. Open your document in Microsoft Excel or PowerPoint and click **Discover Content Risk** in the Workshare Panel.

   NOTE: The document must be saved in order for Workshare Professional to discover content risk. If you have not saved your document, a message is displayed prompting you to save. Click **Yes**.

   Workshare Professional queries the document to determine the content risk contained in the document. This process may take a few moments if your document is large or if it contains large amounts of content risk. Once the discovery process is complete, the Document Risk Report is displayed showing the details of the content risk found:



   The content risk found is divided into high risk, medium risk and low risk. In each category, the content risk is listed by type. For example, hidden text, fields, and statistics.

2. To print the report, click **Print**.

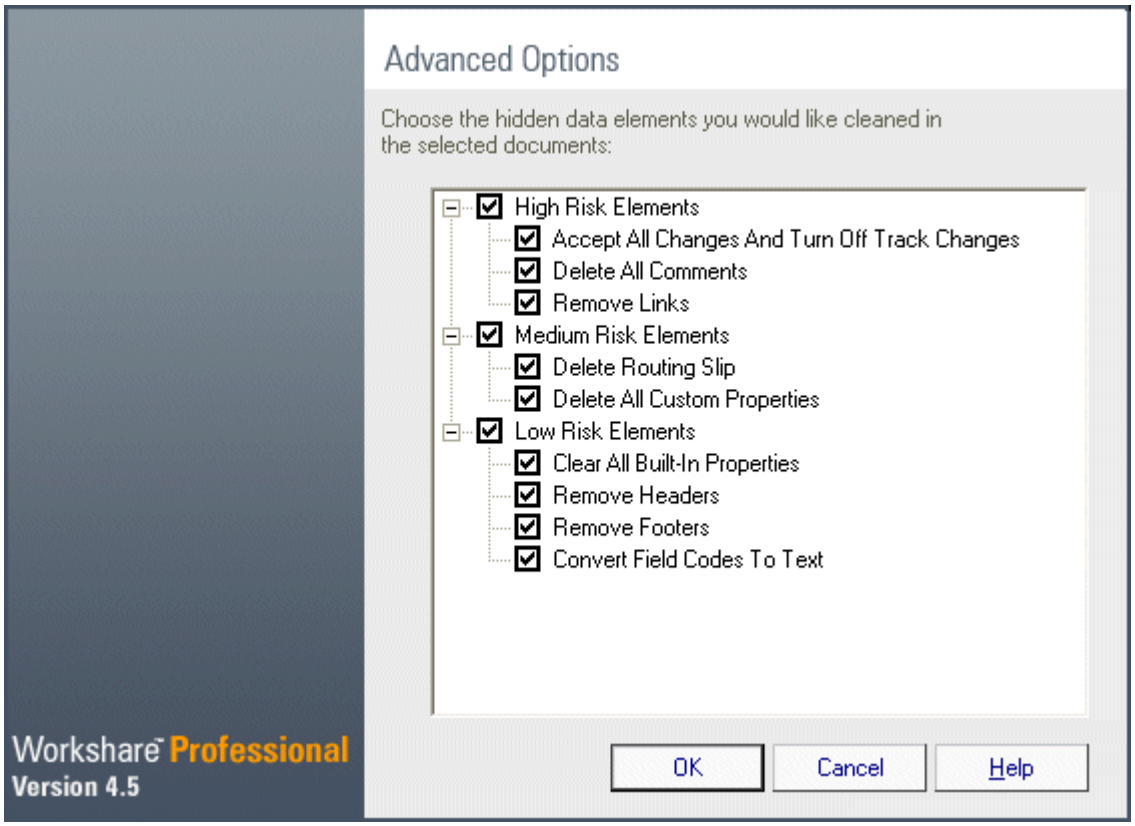
3. To remove the hidden data from the Microsoft Excel or PowerPoint document, click **Remove**. Refer to *Cleaning Hidden Data*, page 110, for further information.

Cleaning Hidden Data

In Microsoft Office documents, once you have discovered the content risk in a document, you can remove selected types of the discovered hidden data as required.

To remove hidden data:

1. In Microsoft Word, click **Remove** in the Content Risk page. In Microsoft Excel or PowerPoint, click **Remove** in the Document Risk Report. The *Advanced Options* dialog box is displayed.



   A complete list of hidden data that can be removed, reset or converted is listed in the dialog box. For a full description of the different options, refer to *Cleaning Options*, page 111.

2. Select the hidden data you want to remove by selecting the checkboxes to the left of the hidden data options. Selecting the checkbox to the left of, for example, **High Risk Elements** selects all the hidden data options in that category.

   TIP! You can select a category heading (for example, **Medium Risk Elements**) and then deselect one or two hidden data options within that category as required.

3. After making your selection, click **OK**. The selected hidden data is removed from the document.

Workshare Professional may take a few moments to clean you document depending on the size of the document and the amount of hidden data to be removed. The Content Risk page is updated after the document has been cleaned to show any remaining hidden data and content policy violations. After cleaning, the document with hidden data removed is still stored in memory only. If you want to keep the cleaned document, you now have to save the document.

Cleaning Options

The different hidden data cleaning options are explained below:

Option	Description
Clear All Built-In Properties	Microsoft Word, Excel and PowerPoint. Removes all summary properties - author, category, comments, company, keywords, manager, title, subject, and hyperlink base; and custom properties – text, date and number. Built-in properties can be viewed in Microsoft Word, Excel and PowerPoint by selecting **Properties** from the *File* menu and then selecting the **Summary** tab.
Reset Document Statistics	Microsoft Word only. Resets all the document statistics - total edit time, revision number, last authors, and file dates. Statistics and file dates can be viewed in Microsoft Word by selecting **Properties** from the *File* menu and then selecting the **Statistics** tab.
Clear All Previous Authors	Microsoft Word only. Removes information about all authors who have previously saved the document as well as save locations. This information cannot be viewed from within Microsoft Word but it is visible from Microsoft Word if the file is opened in recovered text mode.
Clear All Document Reviewers	Microsoft Word only. Removes information about all document reviewers who have made changes in the document. Track changes are not removed, but information about the user who made the change is removed.
Accept All Changes And Turn Off Track Changes	Microsoft Word and Excel. Accepts all revisions made to the document. The revisions are therefore no longer displayed as revisions but rather as text in the document. Track changes is also turned off so that further revisions are not tracked.
Delete All Comments	Microsoft Word, Excel and PowerPoint. Removes any comments embedded in the document.
Remove Headers	Microsoft Excel and PowerPoint. Removes any headers included in the sheet or slide.
Remove Footers	Microsoft Excel and PowerPoint. Removes any footers included in the sheet or slide.

Option	Description
Delete All Hidden Text	Microsoft Word only. Removes all text that has been formatted as hidden. Hidden text can be viewed in Microsoft Word by selecting **Options** from the *Tools* menu and selecting **Hidden Text** in the **Formatting marks** section of the **View** tab.
Delete All White Text	Microsoft Word only. Removes all text that has been formatted with a font color of white and has no background color. White text can be viewed in Microsoft Word by selecting **Options** from the *Tools* menu and selecting **Blue background, white text** in the **General options** section of the **General** tab.
Delete All Text Smaller Than 5pt	Microsoft Word only. Removes all text that has been formatted with a font size less that 5pt. Small text can be viewed in Microsoft Word by selecting **Zoom** from the *View* menu and specifying a percentage greater than 100%.
Delete Routing Slip	Microsoft Word and Excel. Removes all entries from a routing slip, as well as the message subject and text. This can prevent email addresses of colleagues from being unknowingly distributed. This also deletes any envelope information, such as recipients, subject, and introduction, which are used when sending to a mail recipient. Routing Slip entries can be viewed in Microsoft Word by selecting **Send To** and then **Routing Recipient** from the *File* menu. Envelope information can be viewed in Microsoft Word by selecting **Send To** and then **Mail Recipient** from the *File* menu.
Delete All Custom Properties	Microsoft Word, Excel and PowerPoint. Removes any custom properties that have been added to the document. Custom properties can be viewed in Microsoft Word, Excel and PowerPoint by selecting **Properties** from the *File* menu and then selecting the **Custom** tab.

Option	Description
Convert Field Codes To Text	Microsoft Word, Excel and PowerPoint. Converts any field codes that exist in a Microsoft Word document to text, for example, hyperlinks, table of contents, index. In Microsoft Excel and PowerPoint, hyperlinks are converted to text. This prevents the field codes from being updated after you have distributed the document. It also prevents errors for fields that reference built-in or custom properties that have been removed. **NOTE:** You may want to remove some field codes but not others. For example, you may want to clean 'Include text' field codes, but retain the Table of Contents and Page Numbers. To do this you can specify the field codes you want to keep in the **Hidden Data Exclusions** page of the Workshare Configuration Manager, and then clean field codes as normal. See the *Workshare Professional Administration Guide* for more details. Field codes can be viewed in Microsoft Word by selecting **Options** from the *Tools* menu and selecting **Field Codes** in the **Show** section of the **View** tab.
Delete All Document Variables	Microsoft Word only. Deletes document variables. Document variables are values stored in Microsoft Word documents that are used by either field codes or macros. These variables may contain confidential information such as company names or file locations. Even if field codes and macros are removed, the variables used may remain in the document. Variables can be viewed in Microsoft Word in the Visual Basic Editor.
Convert Attached Template To Normal	Microsoft Word only. Converts the attached template to normal.dot. Automatic style updating is disabled before the template is removed. Therefore the formatting and styles in your document will not be affected by removing the attached template. The attached template can be viewed in Microsoft Word by selecting **Templates and Add-Ins** from the *Tools* menu.
Turn Off Autoversioning	Microsoft Word only. Turns off the flag to automatically save a new version of the document every time the document is closed. Versions can still be saved manually.
Delete All Versions	Microsoft Word, Excel and PowerPoint. Removes any previous versions of the document that you may have saved. Previous versions can be useful while you are developing a document, but often they can contain confidential information that you have removed from the main document. Previous versions can be viewed in Microsoft Word by selecting **Versions** from the *File* menu.

Option	Description
Delete All Macros	Microsoft Word only. Removes VBA macros from the document. This feature is not intended as virus protection, but rather to protect any confidential information, intellectual property or formulas included in the macros. Macros can be viewed in Microsoft Word by selecting **Macro** and then **Macros** from the *Tools* menu.
Remove Links	Microsoft Excel only. Converts external links in Microsoft Excel files to text. The following are examples of external links: • Link to a cell in another Microsoft Excel document. • Named link to a named reference in another Microsoft Excel document. • Link to another document. • OLE link that inserts another document as an icon. • OLE link that inserts another document as text.
Remove Hidden Slides	Microsoft PowerPoint only. Removes hidden slides from Microsoft PowerPoint files. Hidden slides are not required for a slide show (they are not automatically displayed during a slide show) but they may contain confidential information.
Delete Smart Tags	Microsoft Word only. Removes smart tags from Microsoft Word documents. Smart tags are added to your documents as you create them if you have the option enabled. These tags are linked to particular text in your document (such as a name) and allow you to perform certain actions by selecting the link associated with the text. Depending on the smart tag functions you use, they may embed extra hidden information in your document. Smart tags only exist in Microsoft Office XP and later.

NOTE: Workshare Professional can be configured to discover and display content violations, however, this content will not be removed from the document.

Chapter 9: Protecting Email Attachments

This chapter describes the email protection options provided by Workshare Professional. It includes the following sections:

- **Overview**, below, introduces the email protection functionality of Workshare Professional.
- **Sending Email Attachments**, page 117, describes how Workshare Professional can remove hidden data from email attachments as well as convert attachments to PDF.
- **Cleaning Email Attachments**, page 122, describes how to clean hidden data from email attachments as you send them.

Overview

Workshare Professional integrates fully with Microsoft Outlook, Lotus Notes and Groupwise to enable the removal of hidden data from documents when they are emailed. The protection functionality of Workshare Professional can remove hidden data from the following document types:

- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint

Workshare Professional can be configured either to automatically remove hidden data from any attached documents, or to prompt the user when emailing a document with an attachment to determine if hidden data should be removed or not.

Workshare Professional can be configured to remove selected hidden data types. For example, to remove all built-in properties, document statistics and comments. Different configurations can be specified for internal and external recipients.

Workshare Professional can also automatically zip attachments that are over a specified size and convert attachments to PDFs on send.

Additionally, Workshare Professional can be configured so that Microsoft Outlook includes a **Send and Protect** button, which the user can click to remove hidden data from any attachments when sending an email. This allows users to manually clean the document's hidden data if there is no content risk policy configured by your administrator.

Your administrator usually performs this configuration from the Workshare Configuration Manager. This enables a company wide policy for hidden data removal to be enforced. For further information about configuring Workshare Professional, refer to the *Workshare Professional Administration Guide*.

Attachment Checking

Every time you send an email with an attachment, Workshare Professional checks the attachment to see if it contains content risk. If you attach a zip file, Workshare Professional unpacks the zip file to check for documents with content risk. Additionally, Workshare Professional also checks attachments of attached emails (msg files).

Only attachments are checked. If you embedded some text from a Microsoft Word, Excel or PowerPoint document into your email, Workshare Professional does not remove hidden data from the embedded object. Similarly, if you email a document from within Microsoft Word, Excel or PowerPoint and the document text is embedded into the email, it will not be checked for hidden data. To ensure that hidden data is removed when you email documents, always email documents as attachments.

Recipient Checking

Workshare Professional can be configured to remove selected hidden data types according to whether recipients are external or internal.

When you send an email, Workshare Professional takes each recipient in the **To**, **Cc** and **Bcc** fields, and looks them up in the configured address book(s). Usually this is the contacts list or local address book (on your machine) and the global address book (on the server).

For each address there are three possible outcomes:

- The address does not exist in any address book. This is then processed as external.
- The address is a distribution list. In this case, the address of each member of the distribution list is checked.
- The address exists in one of the address books. If so, Workshare Professional does a further check that checks the type of address. Either it will be an Exchange\Notes address (meaning the address exists on the email server), or it will be an SMTP address (meaning the email will be routed via the Internet). If it is a server address, it is processed as internal. If it is an SMTP address, it is processed as external.

When deciding which content risk options to apply, each recipient is checked. If an external recipient is found, external content risk settings are applied. Only if all recipients are internal, are internal content risk settings applied.

When sending a document with an **External Restriction** status, all external recipients are removed. If a distribution list contains an external address, the entire distribution list is removed. If no recipients remain, the email is not sent. If recipients do remain, they will be internal; hence internal content risk settings will be applied when the email is sent.

Attachment Zipping

Workshare Professional can zip any attachments over a configured size limit when email is sent. Different size limits can be configured for internal and external recipients, or zipping can be disabled. By default, automatic zipping is not enabled.

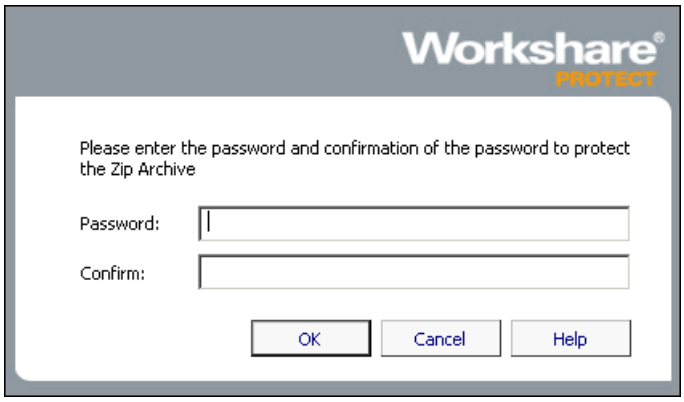
Recipients receive the email with all attachments included in a single zip file. Attachments zipped by Workshare Professional can be unzipped by recipients using either WinZip or PKZip Versions 2.5 and above. Attachments in the following formats can be zipped:

- DOC
- RTF
- XLS
- DOT

If any of the above formats are included as an attachment, ALL attachments will be zipped – even attachments not in the above format. For example, if you sent an email and attached a DOC file and a TIF file. Both files would be zipped into a single ZIP file.

If none of the attachments is in any of the above formats, the attachments will not be zipped. For example, if you sent an email and attached a PDF file and a TIF file. Neither file would be zipped.

Automatic zip files can also be password-protected. If this option is enabled, you are prompted to set and confirm a password whenever a file is automatically zipped by Workshare Professional.



This can be used as an additional security measure if you want to ensure that documents are only sent to the intended recipients. You need to provide the password to the email recipient for them to read the document. It is recommended that you do not distribute this password via email.

Your administrator enables or disables automatic zipping as well as password protection of zip files using the following parameters in the Workshare Configuration Manager:

- **Automatically zip attachments above this MB limit when sent externally**
- **Automatically zip attachments above this MB limit when sent internally**
- **Password Protect Zip Files**

For further information, refer to the *Workshare Professional Administration Guide*.

Sending Email Attachments

When certain document types are sent as email attachments, Workshare Professional can clean hidden data from them as well as convert them to PDF. The document types are as follows:

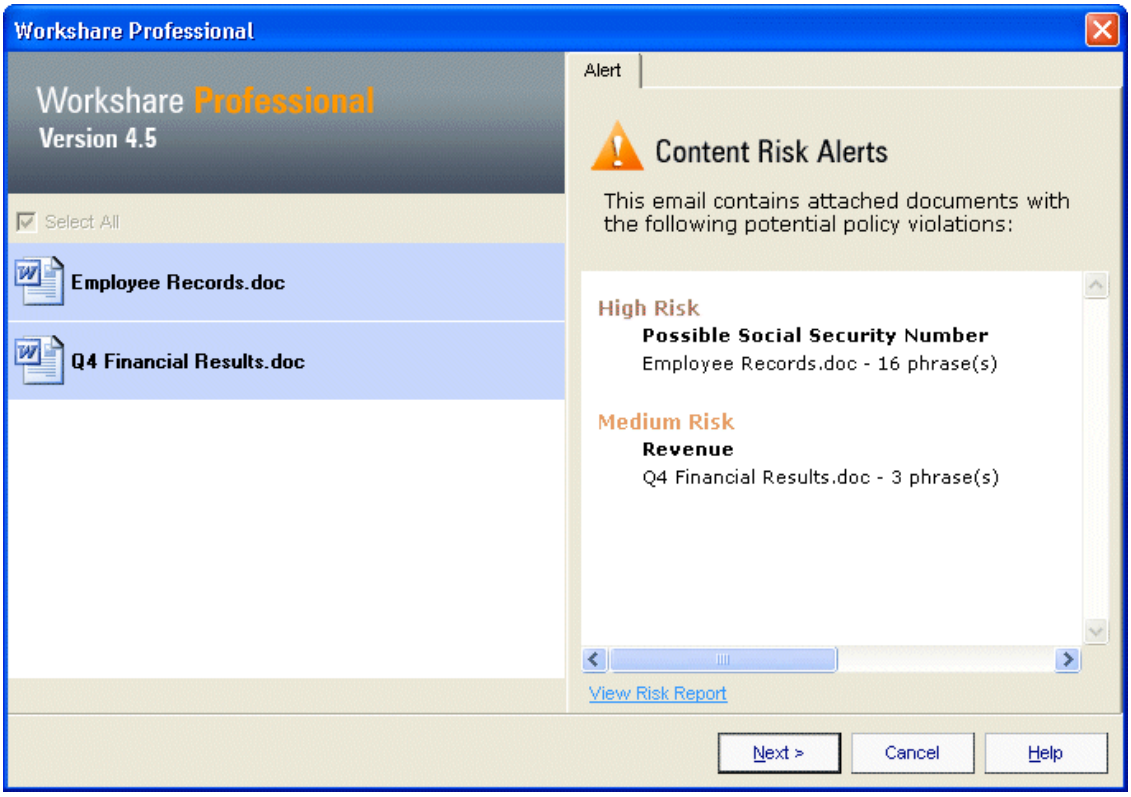
- Microsoft Word document (.doc)
- Rich Text document (.rtf)
- Microsoft Word template (.dot)
- Microsoft Excel document (.xls)
- Microsoft PowerPoint document (.ppt)

Hidden data removal and PDF conversion is performed according to configuration parameters set in the Workshare Configuration Manager. For a detailed description of all of the parameters available, refer to the *Workshare Professional Administration Guide*.

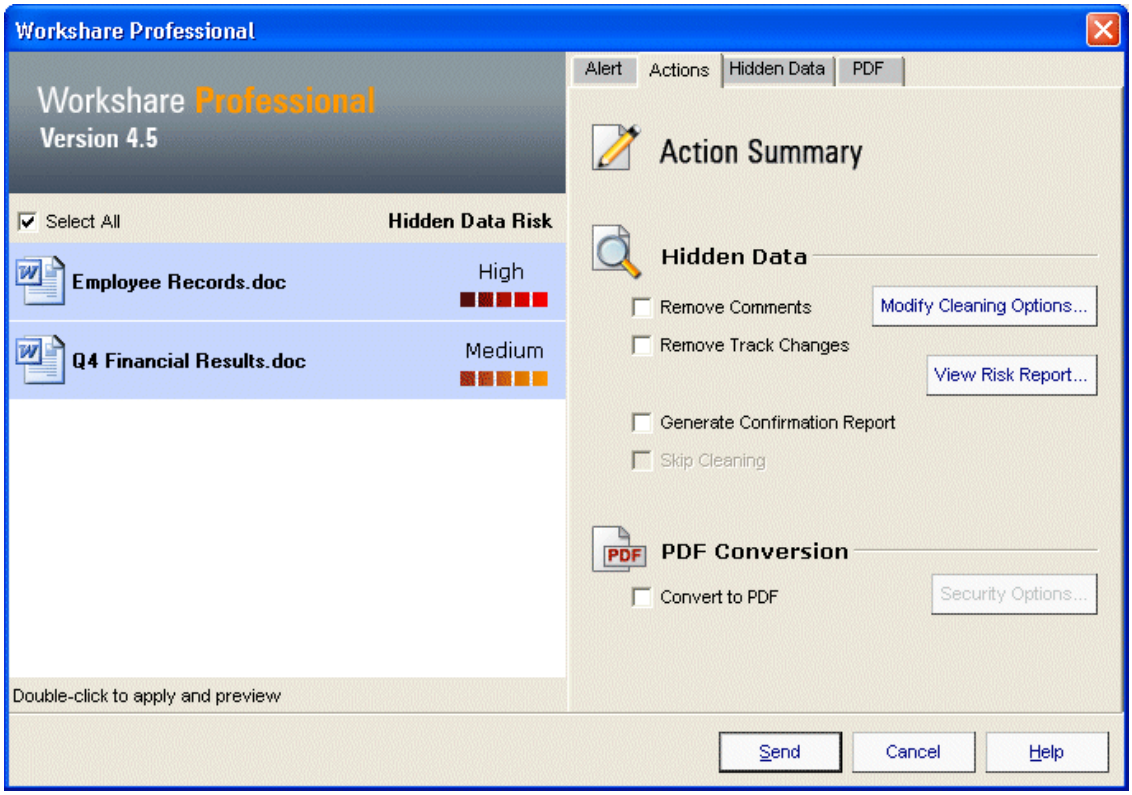
To send email:

1. Prepare the email and attach a document.

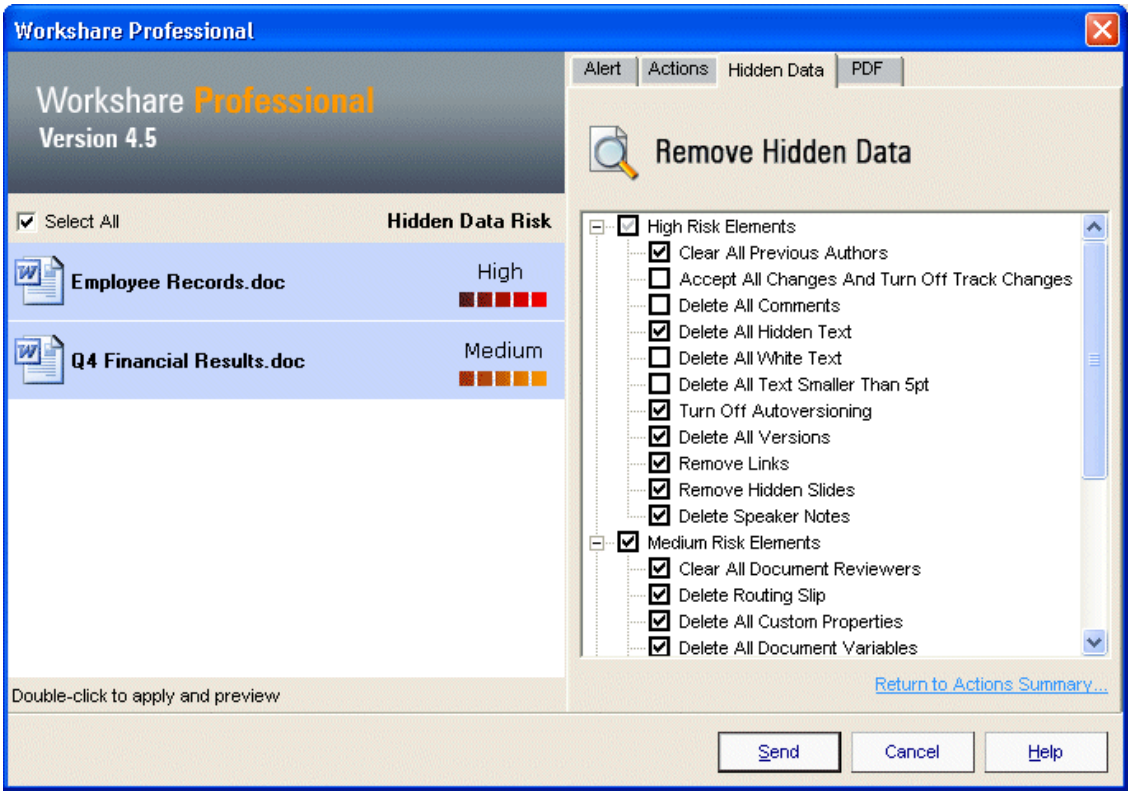
2. Click **Send**.
3. If the attachment is a Word document and the Content Discovery is activated in the configuration, Workshare Professional will alert you if there are any content violations.



4. When you have reviewed these content violations, click **Next** to continue sending the email or click **Cancel** to cancel sending the email.
5. Depending on your company's configuration settings, Workshare Professional will:
   - Remove hidden data and convert the attached documents to PDF according to the settings specified in the Workshare Configuration Manager. Refer to the *Workshare Professional Administration Guide*.
   - Display the following dialog box, which prompts you to select what hidden data you want to remove and whether you want to convert the attached documents to PDF.



6. Select an attachment for which you will specify options or select **Select All** to select all attachments. You can clean different documents in an email with different options by selecting attachments individually.
7. In the **Action Summary** area, select the **Remove Track Changes** and **Remove Comments** checkboxes to remove track changes and comments from the document. Depending on the settings in the Workshare Configuration Manager, these actions may be selected by default.
8. If enabled by your administrator, select **Details…**. The *Remove Hidden Data* tab is displayed showing the full list of hidden data types that can be cleaned.



NOTE: The settings for items that appear in gray have been locked by your administrator. Please speak to your administrator to override these settings.

9. Select the hidden data you want to remove by selecting the checkboxes to the left of the hidden data options. Selecting the checkbox to the left of the category headings, for example, **High Risk Elements**, selects all the hidden data options in that category.

   TIP! You can select a category heading (for example, **Medium Risk Elements**) and then deselect one or two hidden data options within that category as required.

   If you do not click **Details…**, the default settings specified by your administrator will be applied. See the *Workshare Professional Administration Guide* for more details about the different hidden data types.

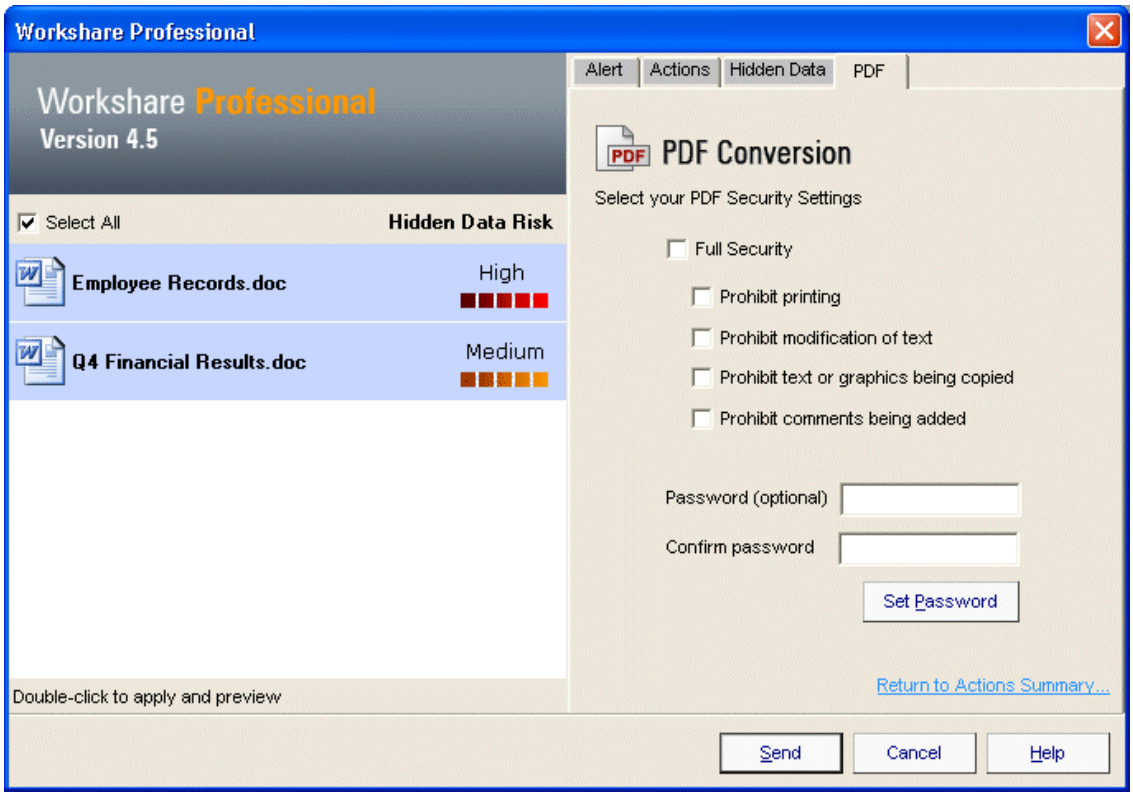
10. Click **Return to Actions page**.

11. In the **Action Summary** area, click **View Risk Report** to discover the content risk in the selected document(s). A risk report is displayed in a separate window and can be saved and printed as required. Refer to *Risk Report*, page 137, for further information. Viewing the risk report enables you to evaluate the content risk contained in the selected attachments.

12. In the **PDF** area, select **Convert to PDF** if you want to convert the attachment to PDF. In this case the document will be sent as a PDF file. The recipient will be able to open and view it in Adobe Reader but will not be able to edit the document at all.

    A **PDF** label is displayed beneath the attachment in the **Attachments** area to show that you have selected to convert it to PDF.

13. If you want to set PDF security options, click **PDF Details…**. The *PDF Conversion* tab is displayed.



14. Select one or more of the security options individually or select the **Full Security** checkbox to select them all. The security options are as follows:
    - **Prohibit printing:** Prevents recipients from printing the PDF document.
    - **Prohibit modification of text:** Prevents recipients with Adobe Distiller from editing the PDF document.
    - **Prohibit text or graphics being copied:** Prevents recipients from copying graphics or text directly from the PDF document.
    - **Prohibit comments being added:** Prevents recipients with Adobe Distiller from adding comments to the PDF document.

    You can protect these security settings by entering a password in the relevant fields.
15. Click **Return to Actions Page**.

> **NOTE:** Double-click an attachment in the **Attachments** area to apply the specified settings and preview the attachment without actually sending the email. You can then confirm that the hidden data cleaning and PDF conversion was correct.

16. Select **Generate Confirmation Report** to display a report of the hidden data that was cleaned when the email is sent. This can be used to confirm that the correct options were applied.
17. Select **Skip Cleaning** to send the attachment without removing any hidden data.

18. Click **Send**. Workshare Professional cleans hidden data from the attached documents and converts it to PDF (according to your selections). Additionally, if Workshare Professional has been configured to automatically zip attachments over a certain size limit, the document is zipped.

    NOTE: Even if you select not to remove hidden data, Workshare Professional can still automatically zip any attachments over the size limit specified in the configuration.

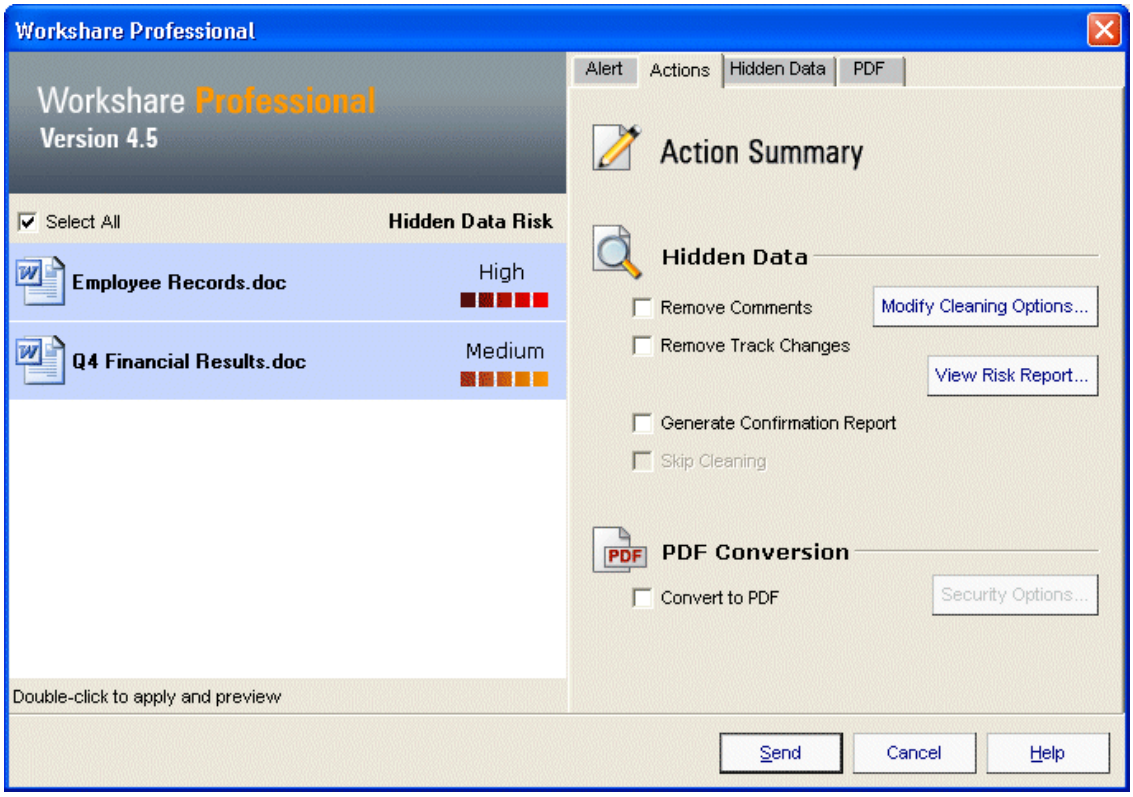
For further information on the different configuration parameters available, refer to the *Workshare Professional Administration Guide*.

Cleaning Email Attachments

When the **Show Send and Protect button in mail messages** parameter (**Email Settings** category) is selected in the Workshare Professional Configuration Manager, the **Send and Protect** button is added to the Standard toolbar in the message window of Microsoft Outlook. This button enables you to clean hidden data from any email attachments as you send them.

To clean email attachments:

1. Prepare your email in the usual way and attach a document or documents as required.
2. Click **Send and Protect**. The following dialog box is displayed.



3. Specify the hidden data to remove as well as whether to convert the attachment to PDF as described in steps 3 to 16 in *Sending Email Attachments*, page 117.

Chapter 10: Controlling Documents

This chapter describes how to control your documents by setting restrictions on whether or not they can be emailed. It includes the following sections:

- **Document Restrictions**, below, introduces the restriction statuses available in Workshare Professional.
- **Setting Restrictions**, page 124, describes how to restrict a document.
- **Emailing Restricted Documents**, page 126, describes the effect a restriction status has on a document when it is emailed.

Document Restrictions

Workshare Professional enables you to set document restrictions that control the distribution of documents via email. The following restrictions are available:

- **No Restriction**: The document is not restricted and can be emailed freely. Use this status on a completed document that needs to be distributed to clients for review.
- **External Restriction**: The document is restricted and can only be distributed internally within your organization. Use this status if you are collaborating on a document with colleagues, but the document is not yet ready for client review.
- **Full Restriction**: The document is restricted and cannot be distributed via email. Use this status if you are working on a document yourself and do not want it distributed. This restriction can also be used in conjunction with DMS security to ensure that all users access the document via your DMS, and cannot email the document to other users. In this way you can be sure that the document is only viewed by those with DMS access to the document.

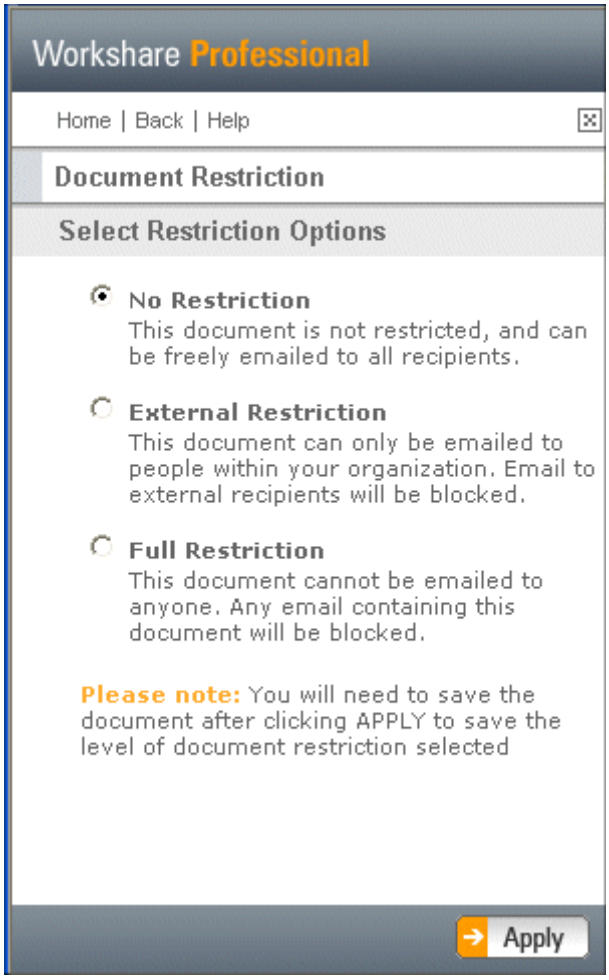
These restrictions can be password-protected. This ensures that only users who know the password can remove a restriction status from documents, and allow them to be emailed.

SETTING RESTRICTIONS

Document restrictions are set from the Document Restriction page of the Workshare Panel. If required, you can password-protect a restriction status so that only users who know the password can remove or change a restriction status for a document.

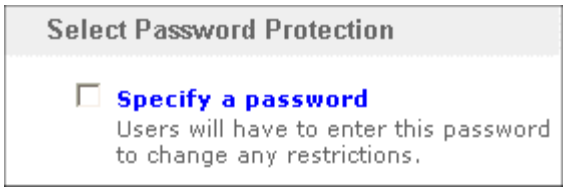
To set document restrictions:

1. With your document open in Microsoft Word, Excel or PowerPoint, click **Restriction** in the Workshare Panel or select **Document Restriction** from the *Workshare* menu when using Microsoft Word. The Document Restriction page is displayed.

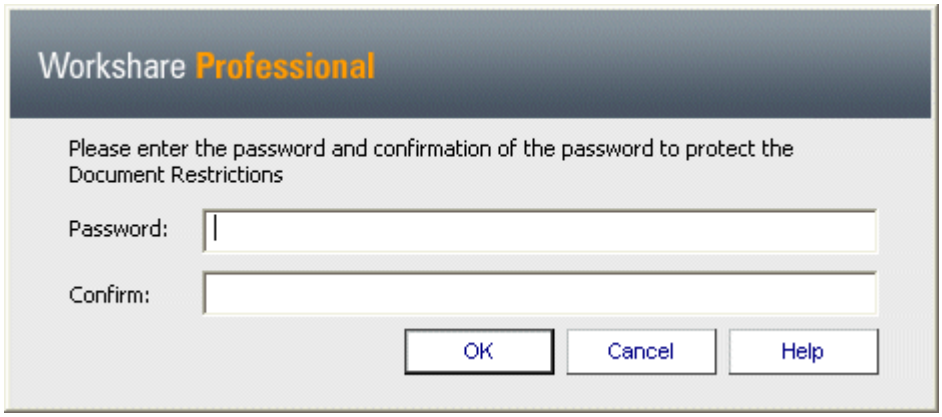

Workshare Professional
Home | Back | Help
Document Restriction
Select Restriction Options
No Restriction
This document is not restricted, and can be freely emailed to all recipients.
External Restriction
This document can only be emailed to people within your organization. Email to external recipients will be blocked.
Full Restriction
This document cannot be emailed to anyone. Any email containing this document will be blocked.
Please note: You will need to save the document after clicking APPLY to save the level of document restriction selected
Apply

2. Select the restriction status you require for the open document from the following:
   - **No Restriction**: The document is not restricted and can be emailed freely.
   - **External Restriction**: The document is partially restricted and can only be emailed internally within your organization.
   - **Full Restriction**: The document is fully restricted and cannot be distributed via email.

3. If you select **External Restriction** or **Full Restriction**, the **Password Protection** area is displayed.



4. If you want to password-protect the restriction status, select the **Specify a password** checkbox. This means that only those who know the password can change the restriction status of the document.
5. Click **Apply**. If you selected the **Specify a password** checkbox, you are prompted for a password.



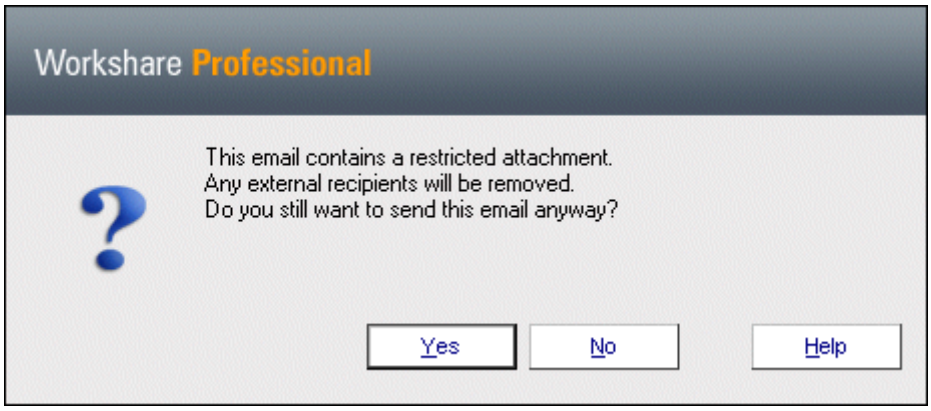
TIP! If you click the words **Specify a password** in the Document Restriction page, the above dialog is displayed immediately before clicking **Apply**.

6. Enter the password twice to set and confirm the password and click **OK**.
7. Save the document. The open document is now restricted according to the selected status.

Emailing Restricted Documents

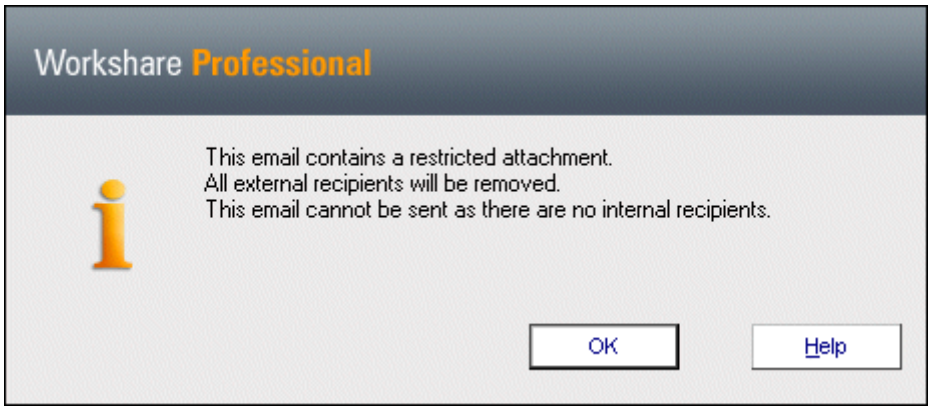
When a document is emailed, the restriction flag is checked and the document is handled according to its restriction status:

- If the document has a **No Restriction** status, it is emailed without any warning.
- If the document has an **External Restriction** status, it can be freely emailed to internal recipients. If you try to email it to an external recipient, you see a warning indicating that the document is restricted. If some recipients are internal, the following message is displayed:



If you click **Yes** to send the email anyway, external recipients are removed and the document is only emailed to internal recipients. You also have the option to click **No** and cancel the email at this point.

If the email is to external recipients only, the following message is displayed:


Workshare Professional
This email contains a restricted attachment.
All external recipients will be removed.
This email cannot be sent as there are no internal recipients.
OK
Help

The email cannot be sent. Click **OK** to cancel the email.

- If the document has a **Full Restriction** status, it cannot be emailed at all. If you try to email it, you see a warning indicating that the document is restricted and that the email cannot be sent.

NOTE: If you send documents with an **External Restriction** status, Workshare Professional removes the external recipients. If the document is sent to a distribution list, each member of the distribution list is checked. If Workshare Professional finds an external address in the distribution list, Workshare Professional removes the entire distribution list. Only distribution lists with all internal users will remain.

Chapter 11: Converting to PDF

This chapter describes how to convert your documents to PDF using Workshare Professional. It includes the following sections:

- **Overview**, below, introduces the PDF conversion functionality available in Workshare Professional.
- **Creating PDFs**, below, describes how to convert a document to PDF.
- **Creating PDFs and Sending by Email**, page 131, describes how to convert a document to PDF and send by email.

Overview

Workshare Professional enables you to quickly and easily convert Microsoft Office documents into PDF (Portable Document Format). This Workshare Professional functionality is available from within Microsoft Word, Excel and PowerPoint environments.

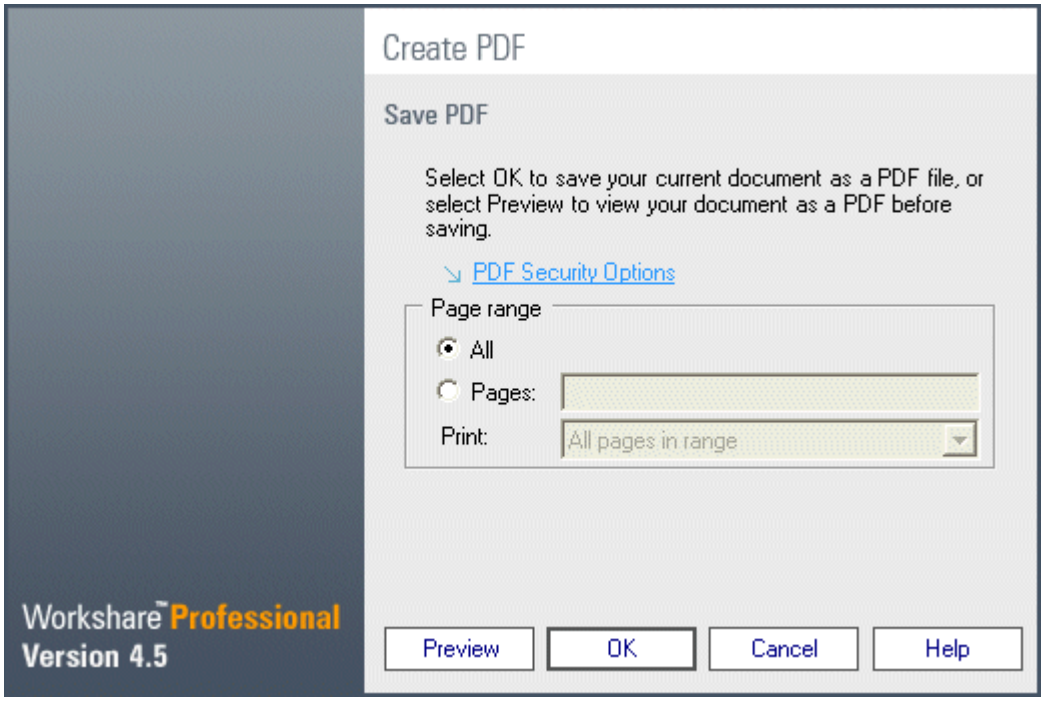
Creating PDFs

At any time when working on a document in Microsoft Word, Excel or PowerPoint, you can convert the document into PDF. This is useful if you want to maintain a file in its current format, as PDF documents cannot be edited as easily as Microsoft Word, Excel and PowerPoint documents.

To create a PDF:

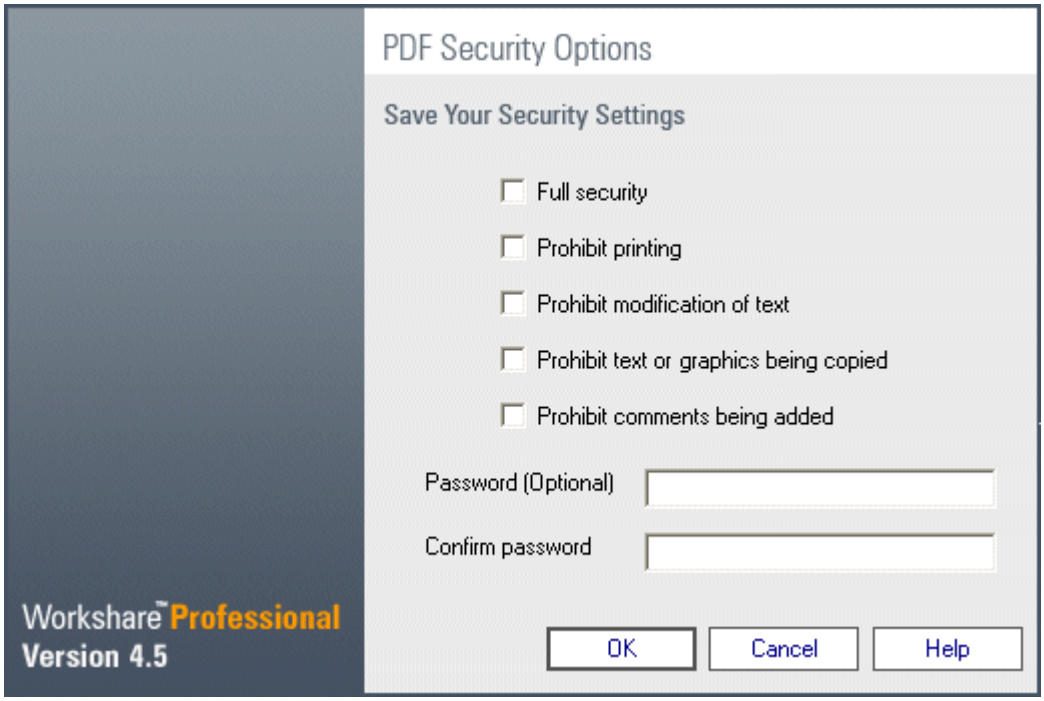
1. To convert a Word, Excel or PowerPoint document to PDF format:
   - Open your document in Microsoft Word, select **Convert to PDF** from the *Workshare* menu, or click **Convert to PDF** in the Home page of the Workshare Panel, or click the **Create New PDF** button in the toolbar.
   - Open your document in Microsoft Excel, click **Convert to PDF** in the Workshare Panel or click the **Create New PDF** button in the toolbar.
   - Open your document in Microsoft PowerPoint, click **Convert to PDF** in the Workshare Panel or click the **Create New PDF** button in the toolbar.
   - Right-click the closed Word, Excel or PowerPoint file on your desktop or DMS and select **Convert to PDF with Workshare** from the menu.

The *Create PDF* dialog box is displayed:

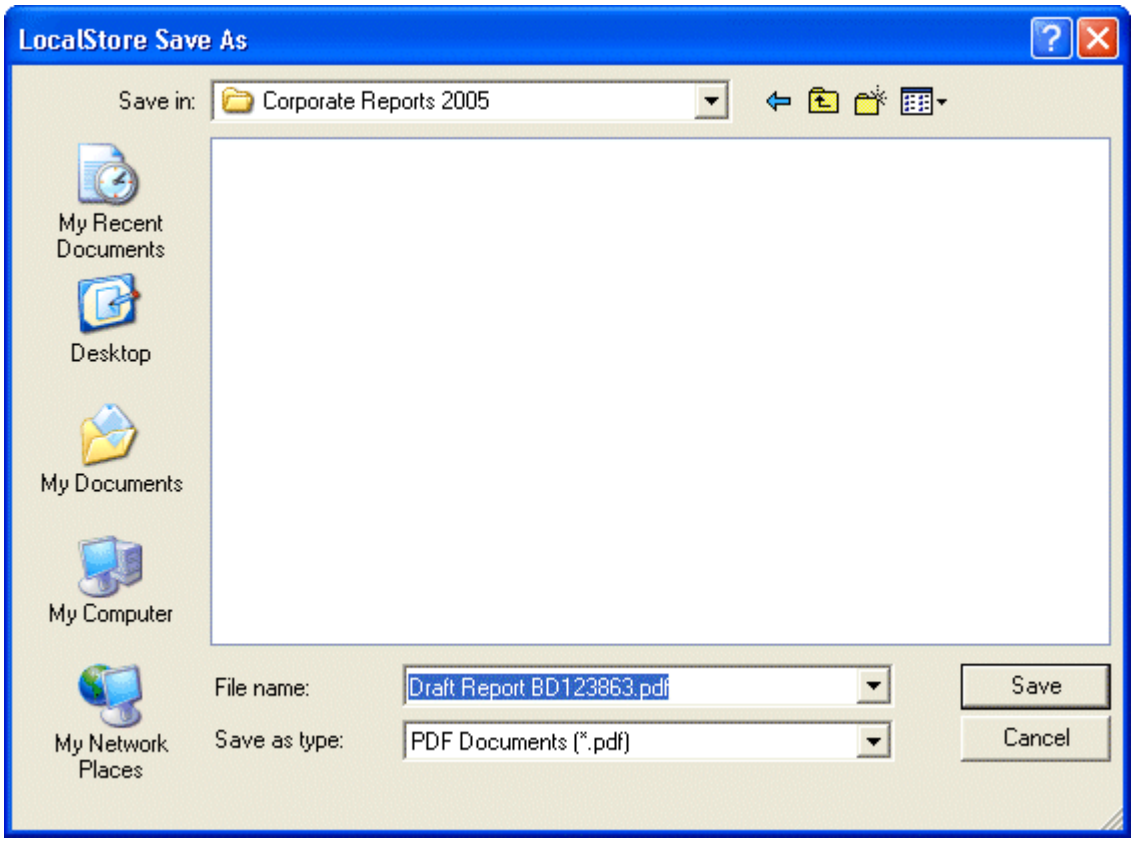


NOTE: The **Print range** area is slightly different in Microsoft Excel and PowerPoint.

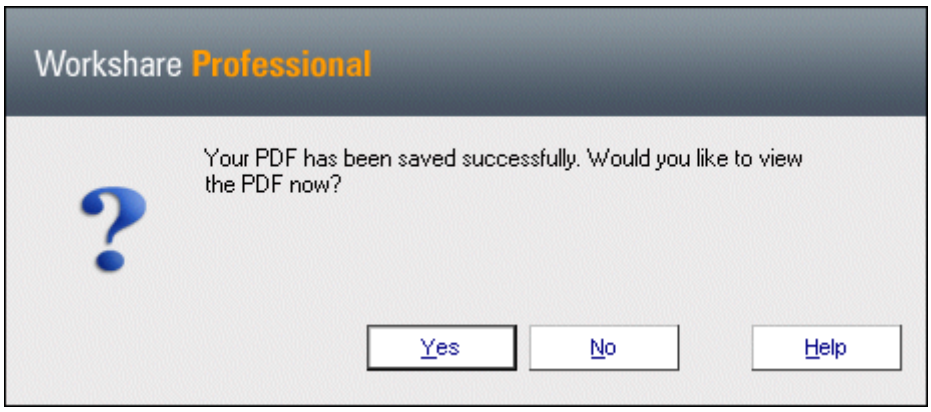
2. If required, you can click the **PDF Security Options** link to set PDF security options. The *PDF Security Options* dialog box is displayed.



3. Select one or more of the security options individually or select the **Full security** checkbox to select them all. The security options are as follows:
   - **Prohibit printing:** Prevents recipients from printing the PDF document.
   - **Prohibit modification of text:** Prevents recipients with Adobe Distiller from editing the PDF document.
   - **Prohibit text/graphics being copied:** Prevents recipients from copying graphics or text directly from the PDF document.
   - **Prohibit comments being added:** Prevents recipients with Adobe Distiller from adding comments to the PDF document.
4. If required, set a password for access to the PDF by entering the password twice to set and confirm the password in the relevant fields. By setting a password, the recipient can remove the security from the PDF (by selecting **Document Security** from the *File* menu in Adobe Acrobat). If you do not specify a password here (and communicate it to the recipient), the recipient cannot change/remove the security set for the PDF.
5. Click **OK**.
6. If you want to create a PDF of part of the document only, select the **Pages** radio button and specify a page range. From the **Print** drop-down list, you can then select whether to PDF all pages in the specified range or only the odd or even pages.
7. If required, click **Preview** to view the document as a PDF.
8. Click **OK**. A Save dialog box is displayed:



9. Specify the name and location for the PDF file and click **Save**. The document is converted to PDF. When the process is complete, the following message is displayed:



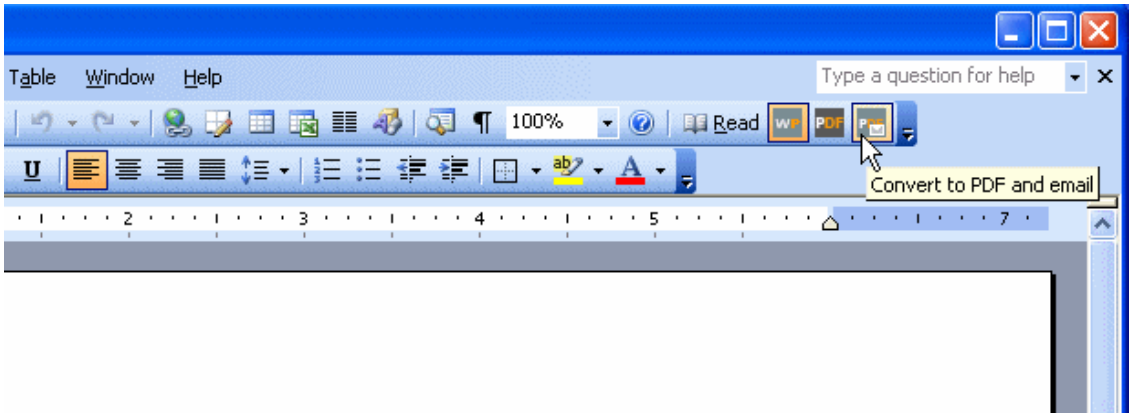
10. Click **Yes** to open the PDF file. If you click **No**, you can open the PDF at any later time from the save location.

Creating PDFs and Sending by Email

At any time when working on a document in Microsoft Word, Excel or PowerPoint, you can convert the document into PDF and send it by email.

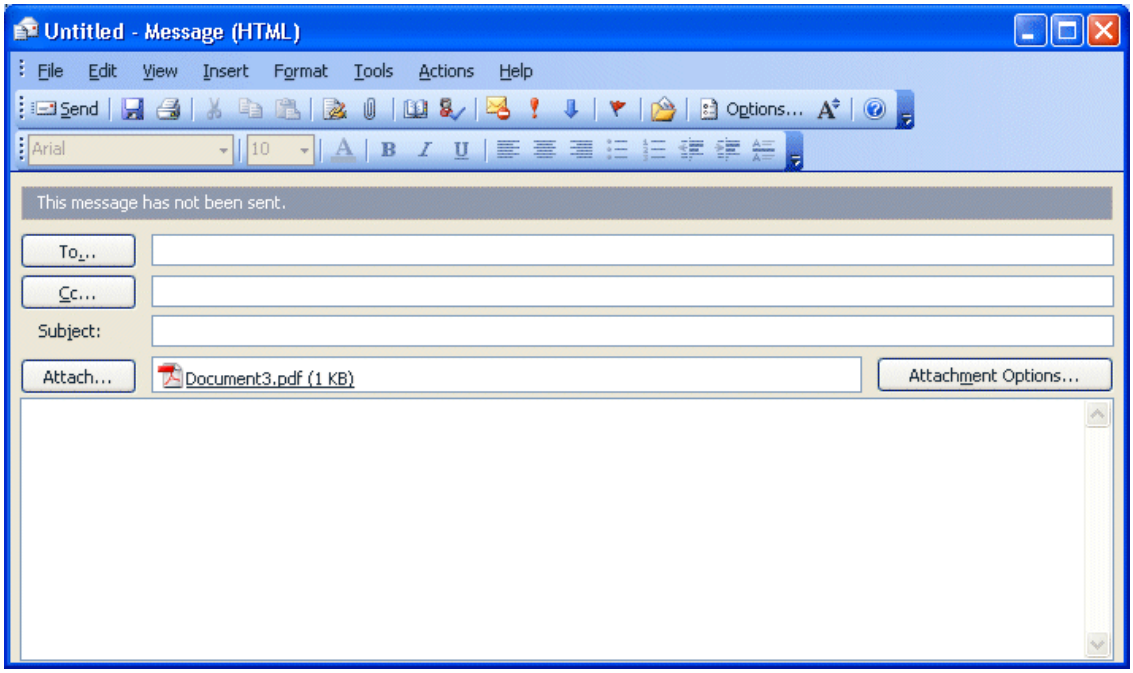
To create a PDF and send by email:

1. Open your document in Microsoft Word, Excel or PowerPoint and click the **Convert to PDF and email** button in the toolbar. The *Create PDF* dialog box is displayed.



2. The Create PDF dialog box is displayed. Follow the procedure to create a PDF as described in steps 2 to 9 (page 129) of the **Creating PDFs** section.

3. After specifying a save location and clicking **Save**, an email message window is displayed with a PDF of the open document as an attachment.



4. Enter the recipient(s) name and any other text you want to include and click **Send**. The PDF document is sent to the specified recipients.

Chapter 12: Creating Reports

This chapter describes how to create different reports using the Workshare Professional Report Wizard. It includes the following sections:

- **Overview**, below, introduces report functionality available in Workshare Professional.
- **Review Report**, page 135, describes how to create a report showing changes proposed to your document.
- **Risk Report**, page 137, describes how to create a report showing the different types of content risk in your document.
- **Audit Report**, page 139, describes how to create a report showing when your document was sent for review as well as a list of all proposed changes and their status.
- **History Report**, page 141, describes how to create a report showing when your document was sent for review and when changes were received.

OVERVIEW

Workshare Professional enables you to quickly and easily generate XML, HTML and PDF reports based on your Microsoft Office documents. The following reports can be created:

- **Audit Report**

  The Audit Report is available in either HTML or XML format and includes the following information:

  - When your document was **Sent for Review** as well as the names and email addresses of the recipients.
  - When suggested changes were received and incorporated into your document.
  - A list of all proposed changes, and their status (applied/rejected/flagged).

- **History Report**

  The History Report is effectively a subset of the Audit Report, displaying when your document was **Sent for Review** (including the recipients) as well as when changes were received and incorporated into your document.

- **Review Report**

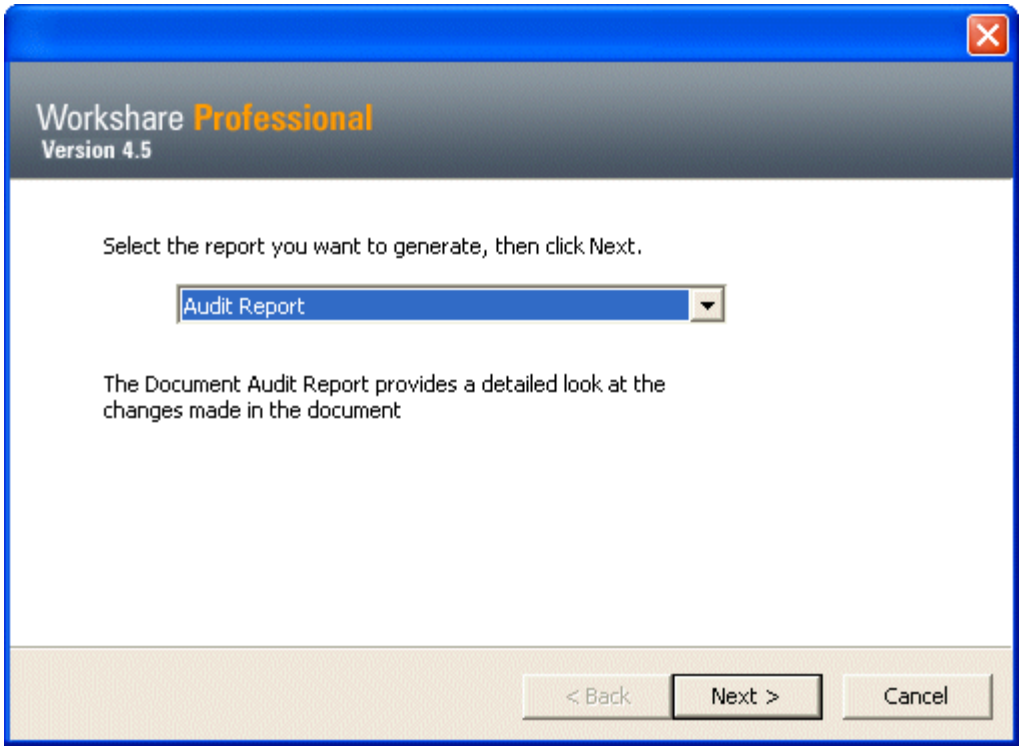
  The Review Report produces a PDF document that includes Redline (comparison) documents showing changes that have been suggested to your document during the review process.

- **Risk Report**

  The Risk Report is a report of the content risk in your document that provides a full account of the different types of content risk in a document. The report is in HTML format and can be printed if required.

The Report Wizard

The Report Wizard is accessible from the Workshare menu. It provides a quick and easy process to produce the different reports. The first page of the Wizard allows you to select what type of report you wish to generate.


Workshare Professional
Version 4.5
Select the report you want to generate, then click Next.
Audit Report
The Document Audit Report provides a detailed look at the changes made in the document
< Back
Next >
Cancel

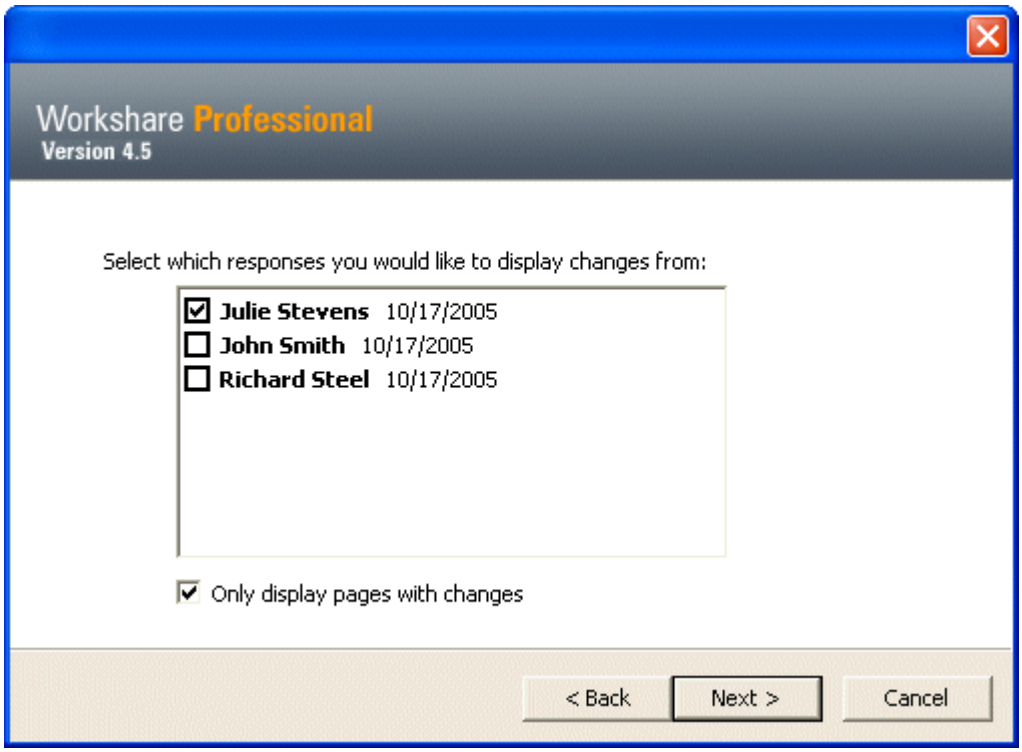
Each report has different characteristics and they are described in the following sections.

REVIEW REPORT

You can create a Review Report to produce a PDF document that includes Redline (comparison) documents showing changes that have been suggested to your document during the review process.

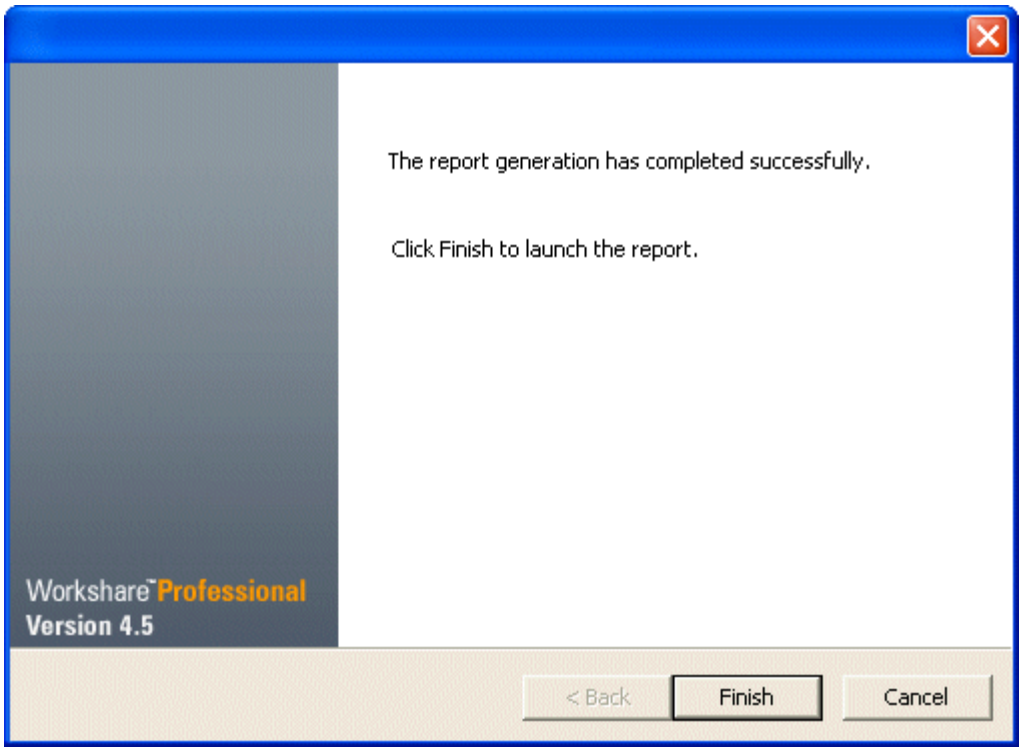
To create a Review Report:

1. From the *Workshare* menu, select **Report Wizard,** or click the **Actions** button in the Manage Changes page of the Workshare Panel and select **Print Reports**. The first page of the Report Wizard is displayed.
2. Select **Review Report** from the drop-down list and click **Next**. The Create Reports page of the Wizard is displayed:

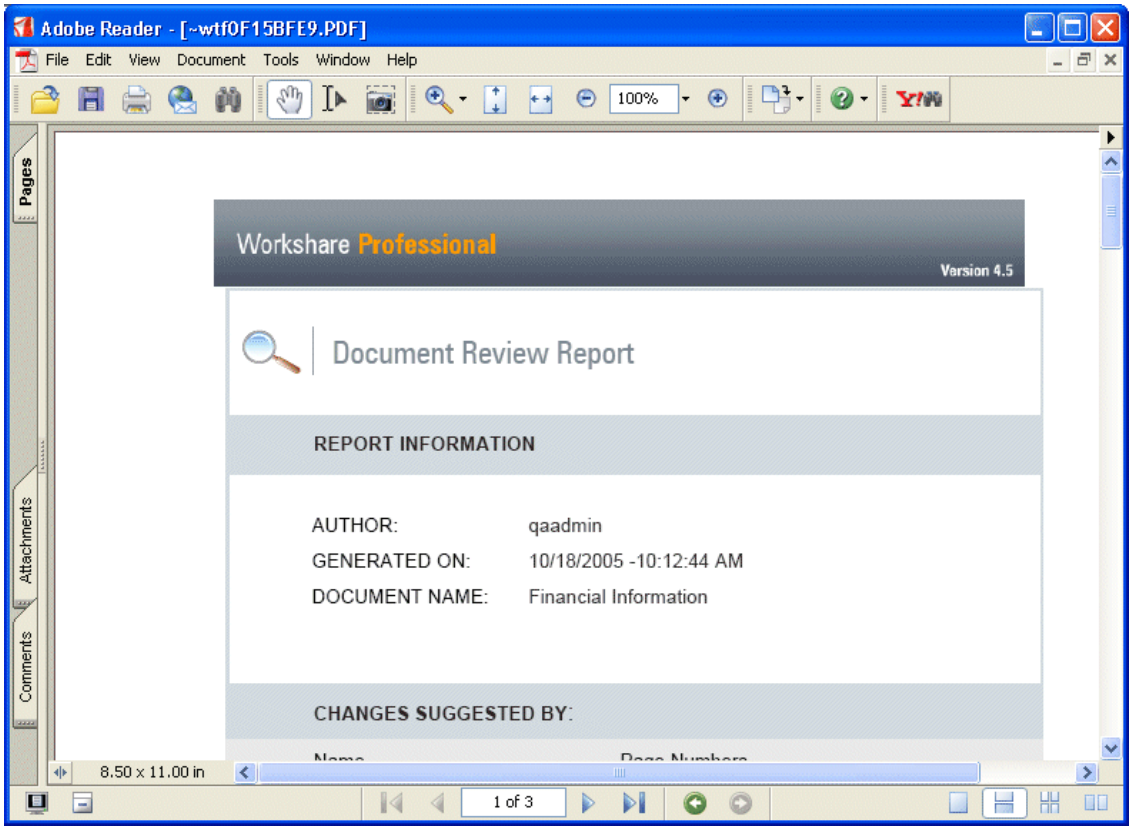


3. Select which responses (and versions for DMS users) you wish to include in the report. The responses are Redline (comparison) documents that show the changes proposed by a reviewer.
4. If required, select the **Only display pages with changes** checkbox to exclude pages from the comparison that do not have any proposed changes.

5. Click **Next**. The report is generated and a progress page is displayed. Once report generation is complete, a confirmation page is displayed as follows:



6. Click **Finish** and your report is loaded into your default PDF viewing application (normally Adobe Reader). An example is shown below:



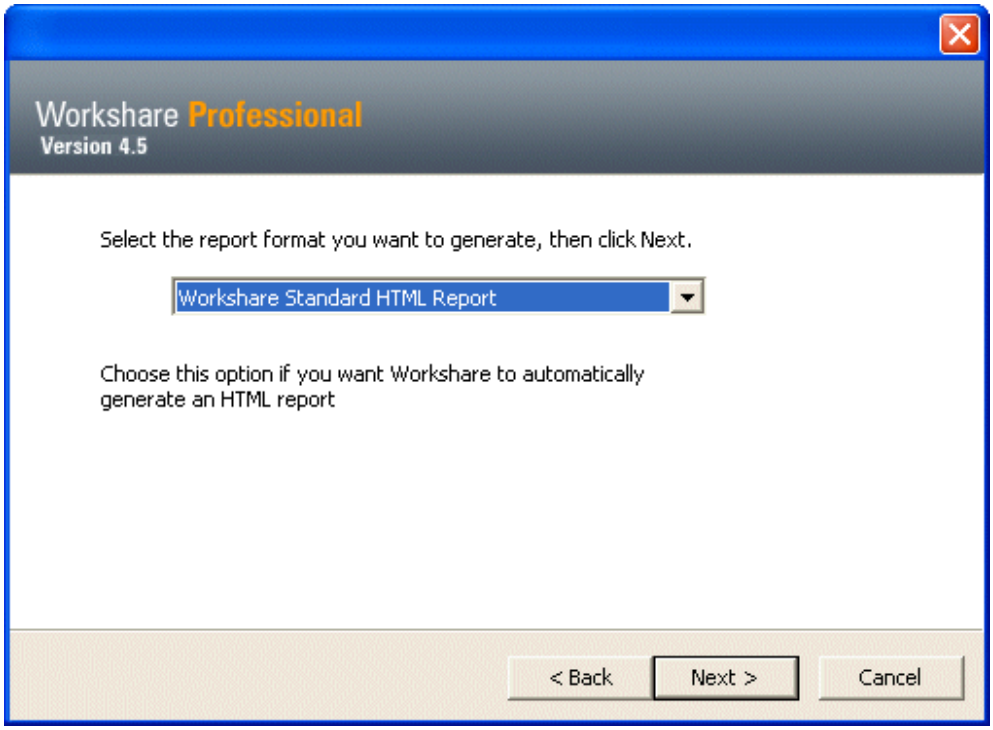
RISK REPORT

You can create a Risk Report that provides a full account of the different types of content risk in a document. The report can be in XML or HTML format and can be printed if required.

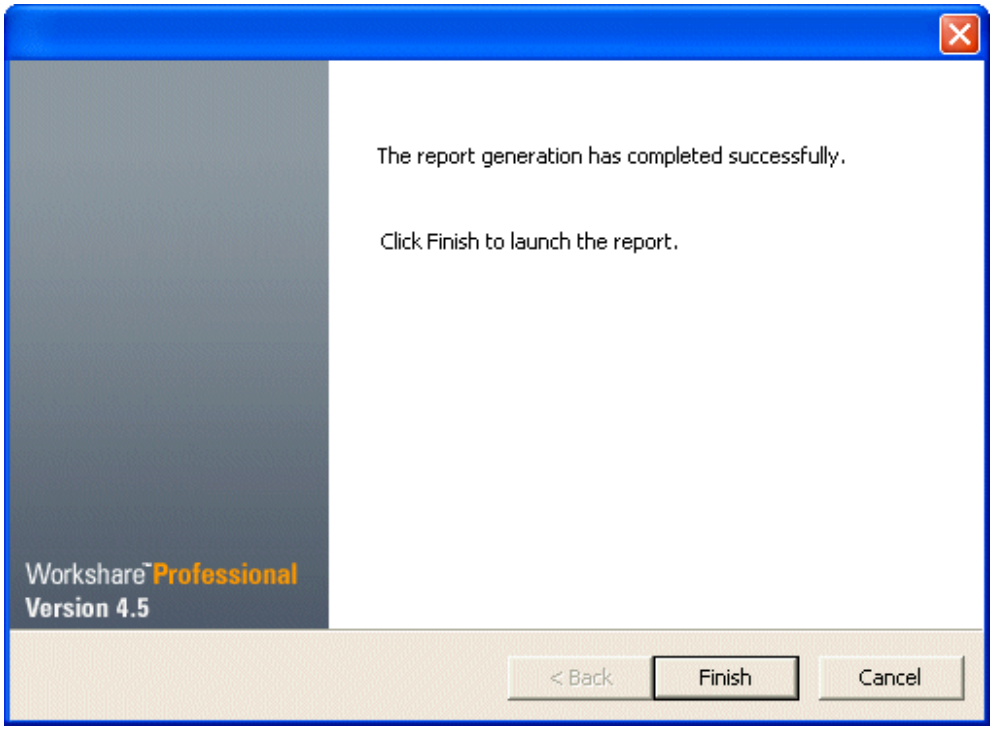
To create a Risk Report:

1. From the *Workshare* menu, select **Report Wizard,** or click **Report** in the Content Risk page of the Workshare Panel. The first page of the Report Wizard is displayed.

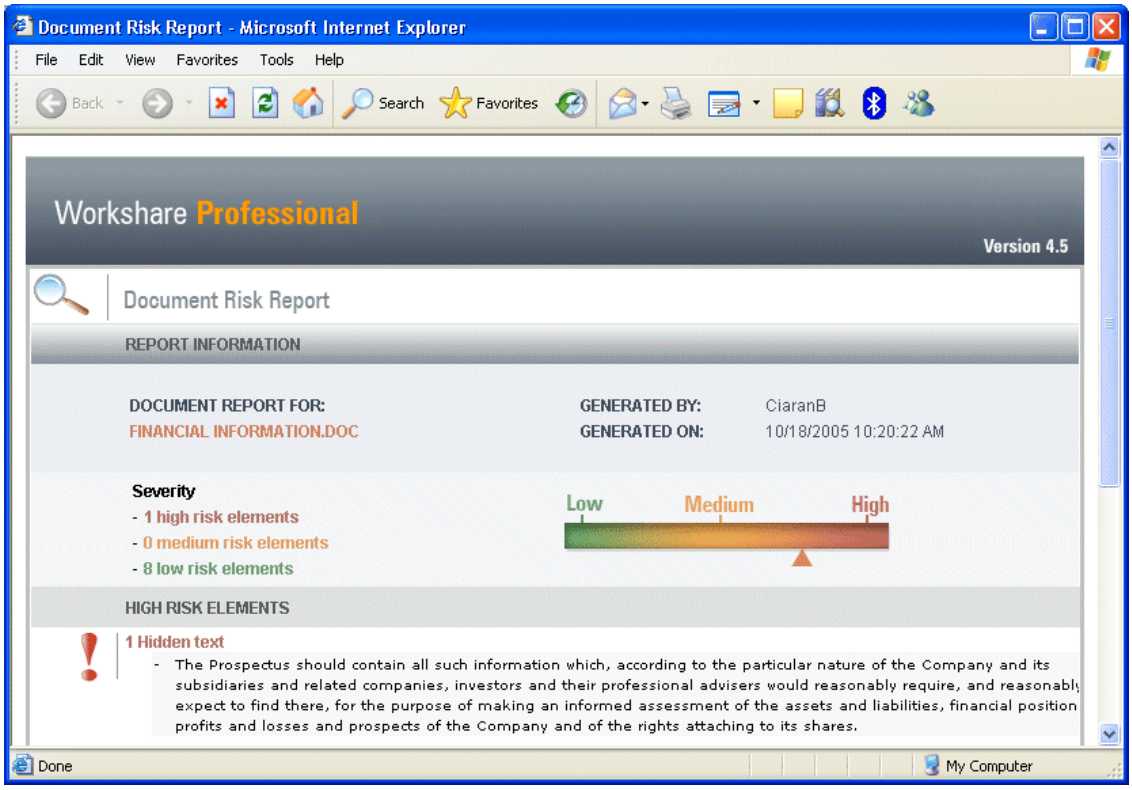
2. Select **Risk Report** from the drop-down list and click **Next**. The Report Format page of the Wizard is displayed:


Workshare Professional
Version 4.5
Select the report format you want to generate, then click Next.
Workshare Standard HTML Report
Choose this option if you want Workshare to automatically generate an HTML report
< Back
Next >
Cancel

3. Select the format of the report – HTML or XML.
4. Click **Next**. The report is generated and a progress page is displayed. Once report generation is complete, a confirmation page is displayed as follows:



5. Click **Finish** to display the report. An example HTML report is shown below:


Document Risk Report - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Workshare Professional
Version 4.5
Document Risk Report
REPORT INFORMATION
DOCUMENT REPORT FOR:
FINANCIAL INFORMATION.DOC
GENERATED BY: CiaranB
GENERATED ON: 10/18/2005 10:20:22 AM
Severity
- 1 high risk elements
- 0 medium risk elements
- 8 low risk elements
Low Medium High
HIGH RISK ELEMENTS
1 Hidden text
- The Prospectus should contain all such information which, according to the particular nature of the Company and its subsidiaries and related companies, investors and their professional advisers would reasonably require, and reasonably expect to find there, for the purpose of making an informed assessment of the assets and liabilities, financial position profits and losses and prospects of the Company and of the rights attaching to its shares.
Done
My Computer

Each content risk category (high, medium, low) is displayed in its own color-coded area and within that area, each content risk type is listed showing the details of the actual content risk found.

For content risk types like track changes or comments, the text associated with the item is listed as well as the user who made the change. For other types like built-in properties, the values of the fields are listed.

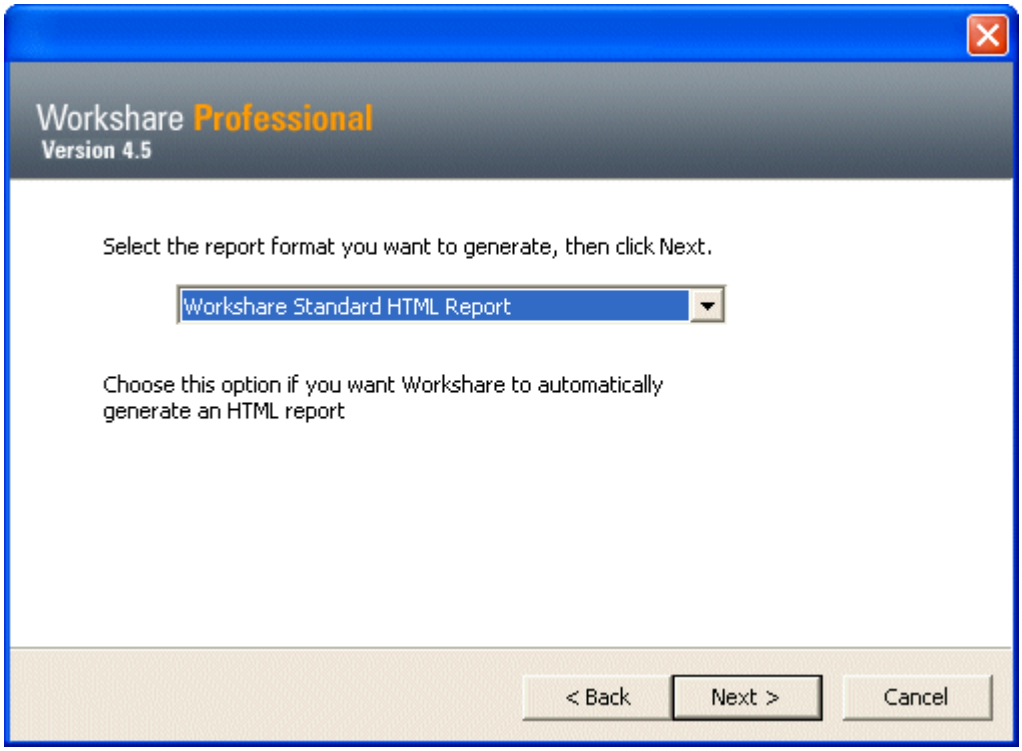
You can print the content risk report by selecting **Print** from the *File* menu.

AUDIT REPORT

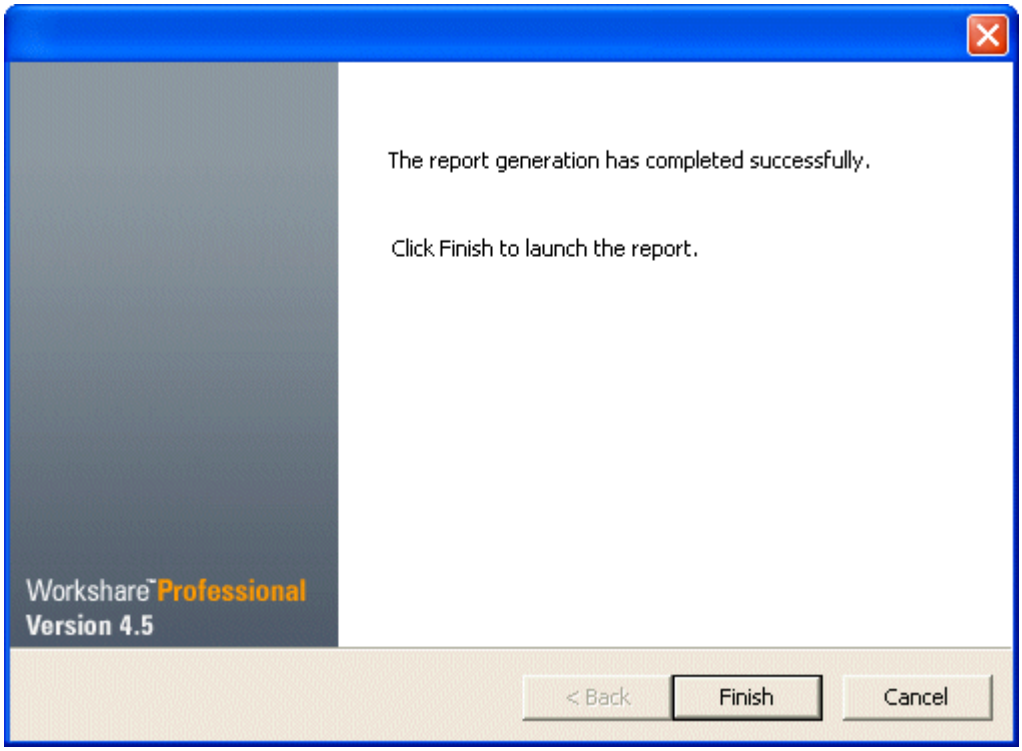
You can produce an audit report that includes information about the review cycle of the document. For example, how many times it has been sent for review, the number of changes proposed, and so on.

To produce an audit report:

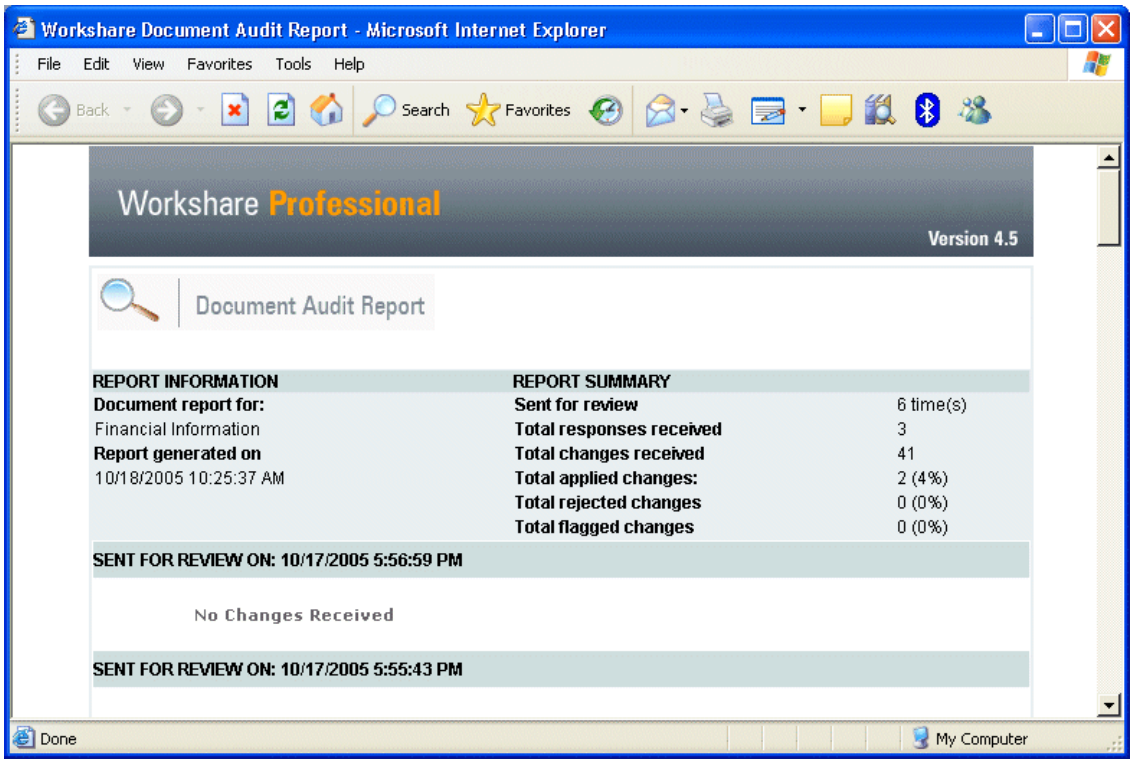
1. From the *Workshare* menu, select **Report Wizard**. The first page of the Report Wizard is displayed.
2. Select **Audit Report** from the drop-down list and click **Next**. The Report Format page of the Wizard is displayed:


Workshare Professional
Version 4.5
Select the report format you want to generate, then click Next.
Workshare Standard HTML Report
Choose this option if you want Workshare to automatically generate an HTML report
< Back
Next >
Cancel

3. Select the format of the report – HTML or XML – and click **Next**. The report is generated and a progress page is displayed. Once report generation is complete, a confirmation page is displayed as follows:



4. Click **Finish** to display the report. An example HTML report is shown below:



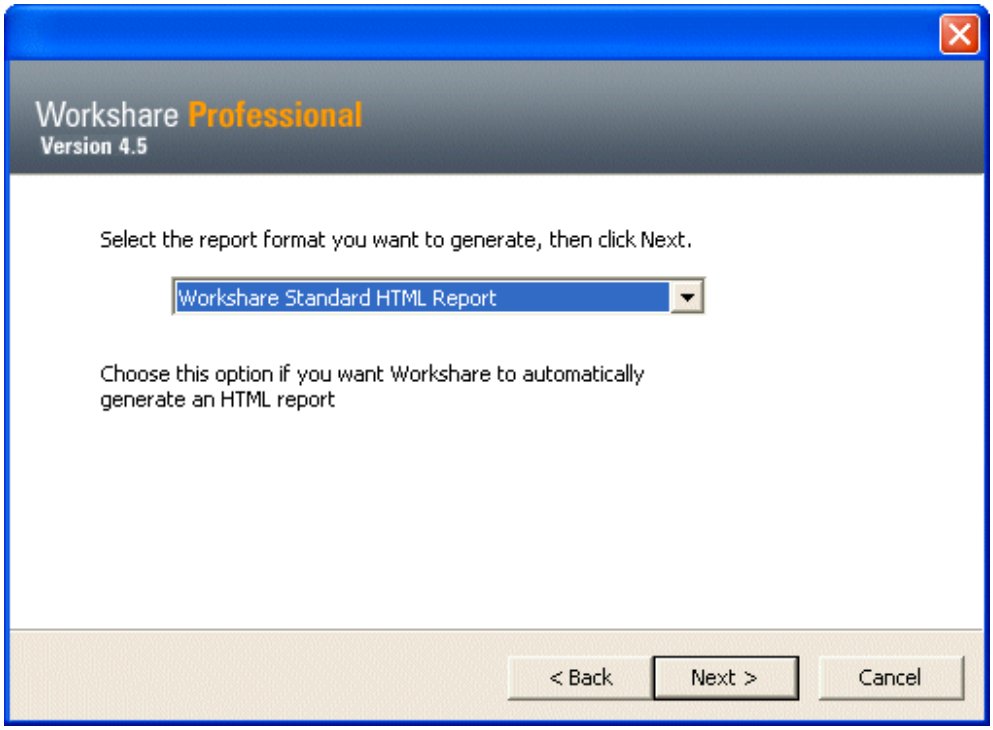
History Report

You can produce a History report that is effectively a subset of the Audit Report, displaying when your document was **Sent for Review** (including the recipients) as well as when changes were received and incorporated into your document.

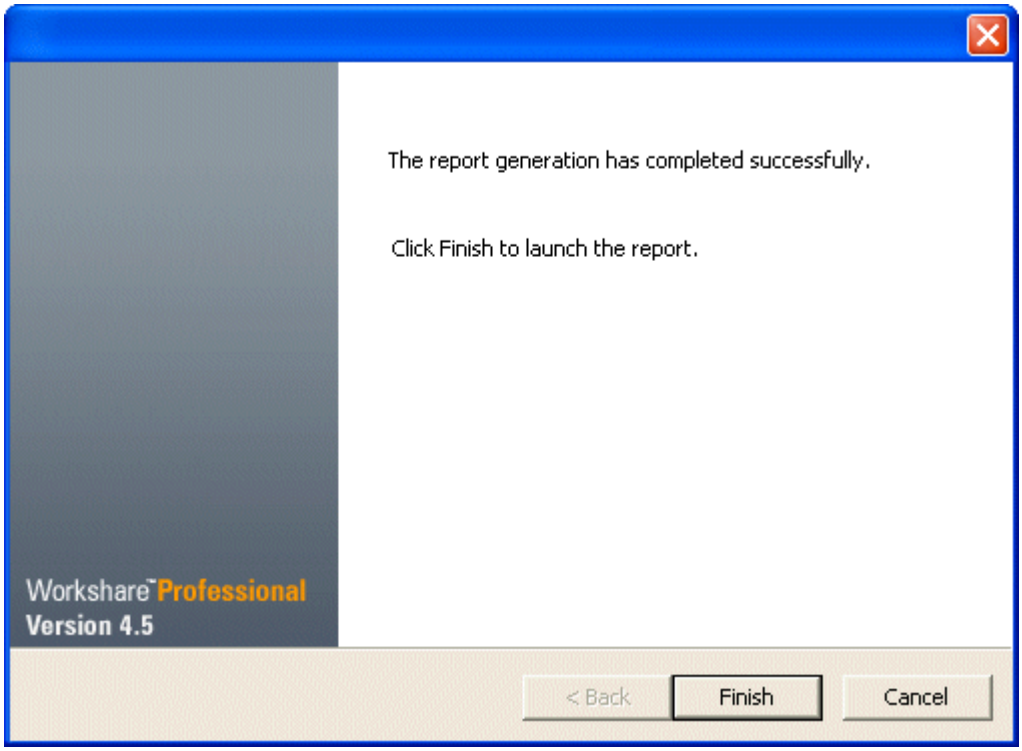
To produce a history report:

1. From the *Workshare* menu, select **Report Wizard**. The first page of the Report Wizard is displayed.

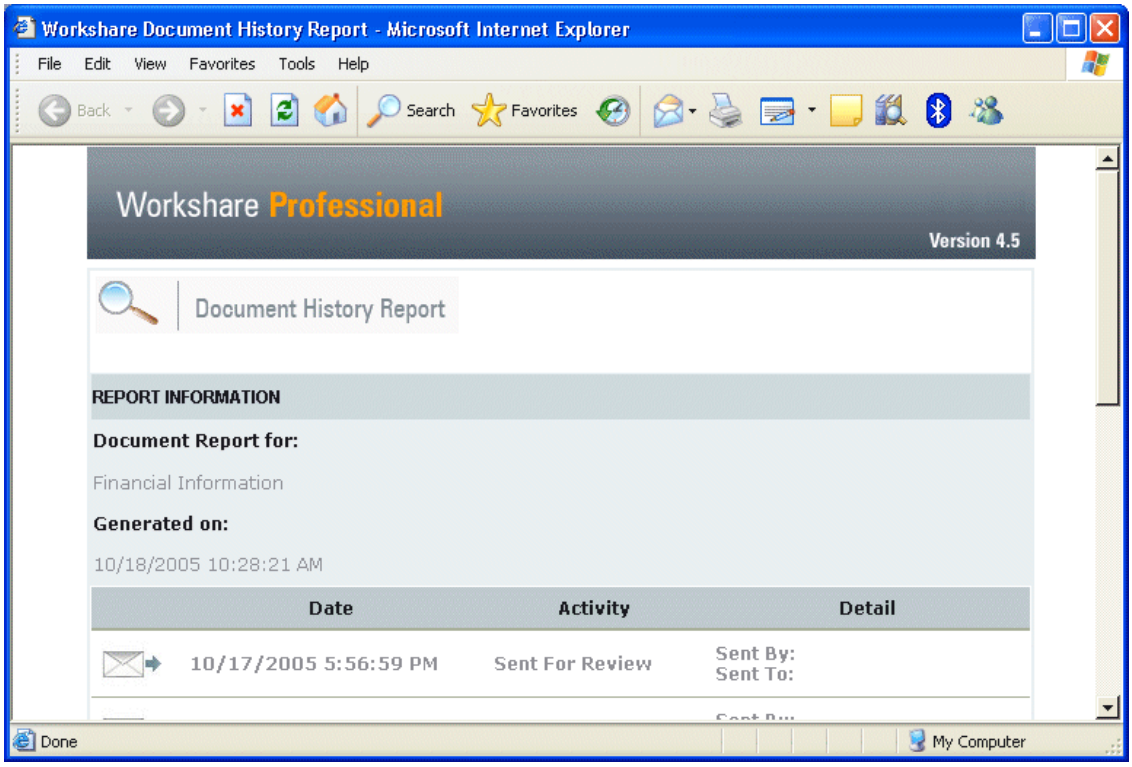
2. Select **History Report** from the drop-down list and click **Next**. The Report Format page of the Wizard is displayed:


Workshare Professional
Version 4.5
Select the report format you want to generate, then click Next.
Workshare Standard HTML Report
Choose this option if you want Workshare to automatically generate an HTML report
< Back
Next >
Cancel

3. Select the format of the report – HTML or XML – and click **Next**. The report is generated and a progress page is displayed. Once report generation is complete, a confirmation page is displayed as follows:



4. Click **Finish** to display the report. An example HTML report is shown below:



Appendix A: Offline Mode

When working with a DMS, it is possible to work on documents in offline mode. To do so, the documents are checked out of the DMS into a local offline directory. The documents can then be worked on locally, for example, on a laptop while traveling. Later, the documents are checked back into the DMS.

When working with an Interwoven DMS, documents can be checked out into Interwoven Portable. When working with DOCS Open, documents can be checked out into SafetyGain. When working with DM5, documents can be checked out into DM5 Attaché.

The full functionality of Workshare Professional is available offline in the following situations:

- When working offline in DM5 Attaché.
- When working offline in Interwoven Portable for Interwoven InfoRite 5.3 and Interwoven DeskSite 6.0, 6.5 and 6.6.

NOTE: You cannot access Workshare Professional functionality in DOCSOpen (SafetyGain) while offline.

Documents created offline will not have Workshare Professional functionality enabled. You must create the document online and then check it out in order to enable Workshare Professional functionality. Also, documents checked out before Workshare Professional is installed will not have Workshare Professional functionality enabled. You must check the document back in and then check it out again after installing Workshare Professional in order to enable Workshare Professional functionality.

Notes for DM5 Attaché

When you check a document back into DM5 (after working on it in DM5 Attaché), you are asked which documents you want to bring in from DM5 Attaché. You will see a list of all Microsoft Word files (DOC) as well as the Workshare Professional document audit files (.w3). The document audit files are flagged so they will not be checked back in. You should leave the settings this way. There is no need to select the document audit files for check in. Workshare Professional will automatically ensure that the document audit files connected to a DOC file are checked in at the same time as the DOC file.

Please note that you can only create collaborations (and check them back in) on documents initially checked out of the DMS.

Notes for Interwoven

When saving a comparison document while offline, you cannot save the comparison into Interwoven Portable. You can only save locally. Thus when you select **Save**, the local File Save As dialog box is displayed. You can save the comparison into the DMS when you are back online.

Appendix B: Configuring Rendering Sets

This chapter describes how to configure rendering sets in Workshare Professional and apply them to a comparison. It includes the following sections:

- **Introducing Rendering Sets**, below, introduces Workshare Professional rendering sets and describes how they determine the look of a Redline document.
- **Applying Rendering Sets**, page 145, describes how to apply a rendering set to a comparison.
- **Customizing Rendering Sets**, page 146, describes how to create your own rendering sets as well as modify and delete existing rendering sets.
- **Rendering Set Parameters**, page 148, provides a detailed description of all the parameters included in rendering sets.

Introducing Rendering Sets

Workshare Professional uses colors and different formats in the Redline document to enable you to see the changes that have been made to the documents.

For example, the following indications can be used:

- Deletions in ~~red with a strikethrough~~
- Insertions in bright blue with a double underline
- Moved or cut text in ~~green with a strikethrough~~
- Pasted (copied) text in green with a double underline
- Moved deletions in ~~salmon pink with a strikethrough~~

The colors and formats adopted depend on the rendering set applied to the comparison. Workshare Professional includes several different rendering sets that you can apply as required or you can modify these rendering sets or create your own rendering set.

NOTE: It is general practice that your system administrator will have been involved in creating a set of standard rendering sets for your company to use and may have restricted the rights of users to create, delete or modify their own rendering sets. If you have restricted access rights and have special requirements for rendering sets, please speak to your system administrator.

Where are Rendering Sets Stored?

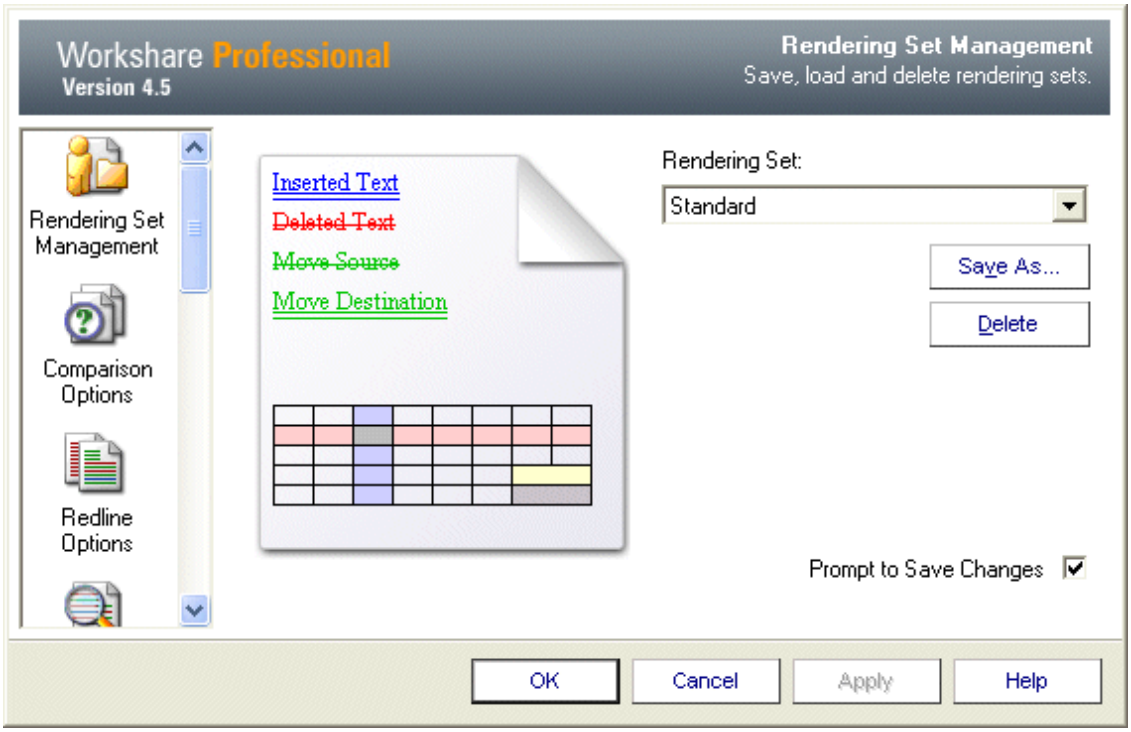
Rendering sets are stored locally in **C:\Program Files\Workshare\Modules\Rendering**, until you move them to a network drive when rolling Workshare Professional out to all users.

Applying Rendering Sets

You can apply a rendering set to a comparison before the comparison is run and also, in Workshare DeltaView, at any time after a comparison has been performed.

To apply a rendering set after the comparison has been run:

1. From the *File* menu in the Workshare DeltaView main window, select **Preferences** and then **Edit Rendering Set** or click in the Workshare DeltaView toolbar. The Rendering Set Manager is displayed with the Rendering Set Management page open.



2. From the **Rendering Set** drop-down list, select a rendering set to apply to the comparison.
3. Click **OK**. Workshare DeltaView re-performs the comparison applying the new rendering set styles to the resulting Redline document.

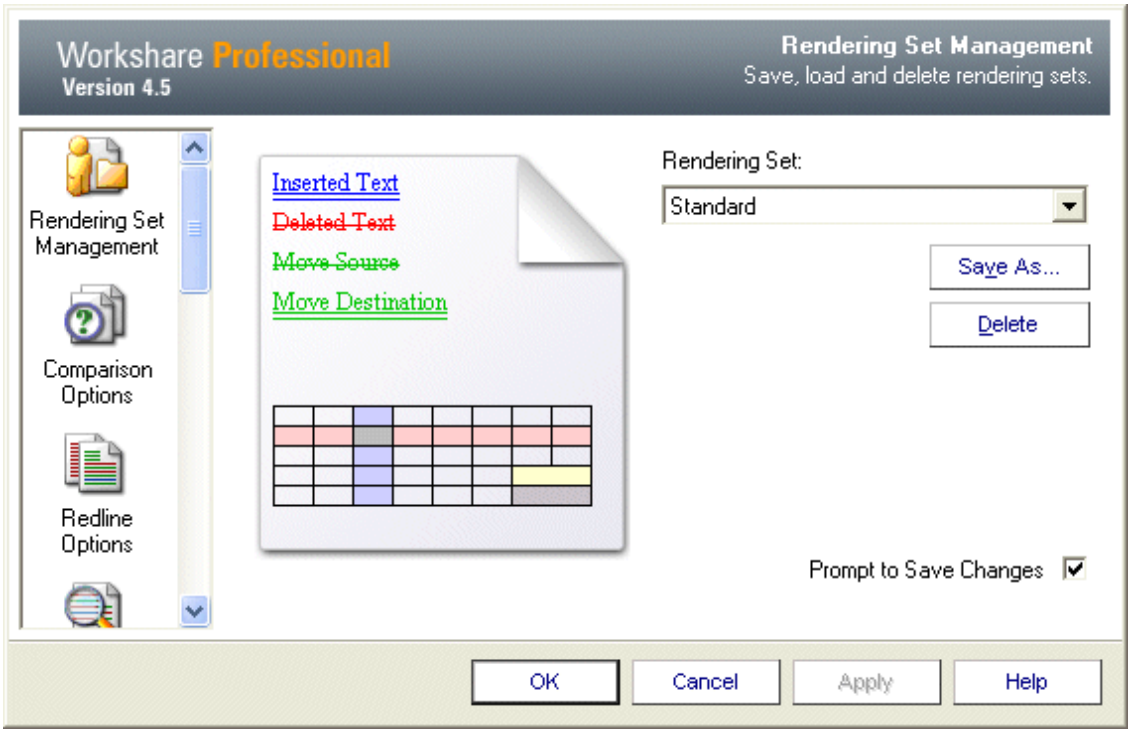
CUSTOMIZING RENDERING SETS

If you have the relevant access rights, you can modify and delete existing rendering sets as well as create new rendering sets.

NOTE: Depending on how Workshare Professional has been distributed through the company, you may or may not have access rights to configure rendering sets. If you have any questions about your access rights, please speak to your system administrator.

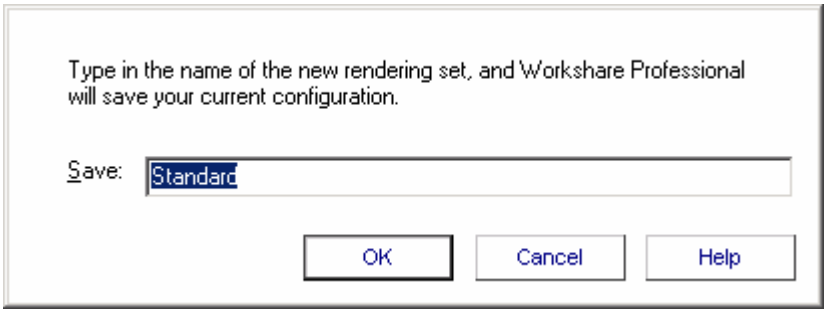
To customize a rendering set:

1. From the *File* menu in the Workshare DeltaView main window, select **Preferences** and then **Edit Rendering Set** or click in the Workshare DeltaView toolbar. The Rendering Set Manager is displayed with the Rendering Set Management page open.



2. From the **Rendering Set** drop-down list, select the rendering set you want to modify or on which you want to base a new rendering set.
3. Configure or modify the parameters for the rendering set as follows:
   - Click a category in the left pane to display parameters for that category in the right pane.
   - Configure the parameters as required.

   Categories and their parameters are described in *Rendering Set Parameters*, page 148.
4. Click **Save As** in the Rendering Set Management page. The following dialog box is displayed:



5. Enter a name for the rendering set. Enter the name of an existing rendering set to overwrite a rendering set or enter a new name to create a new rendering set. Do not use the following characters when naming rendering sets: <, >, :, \, “, /, \\ or |.
6. Click **OK**.

Deleting Rendering Sets

In the Rendering Set Management page of the Rendering Set Manager, select the rendering set to delete from the **Rendering Set** drop-down list and click **Delete**.

Rendering Set Parameters

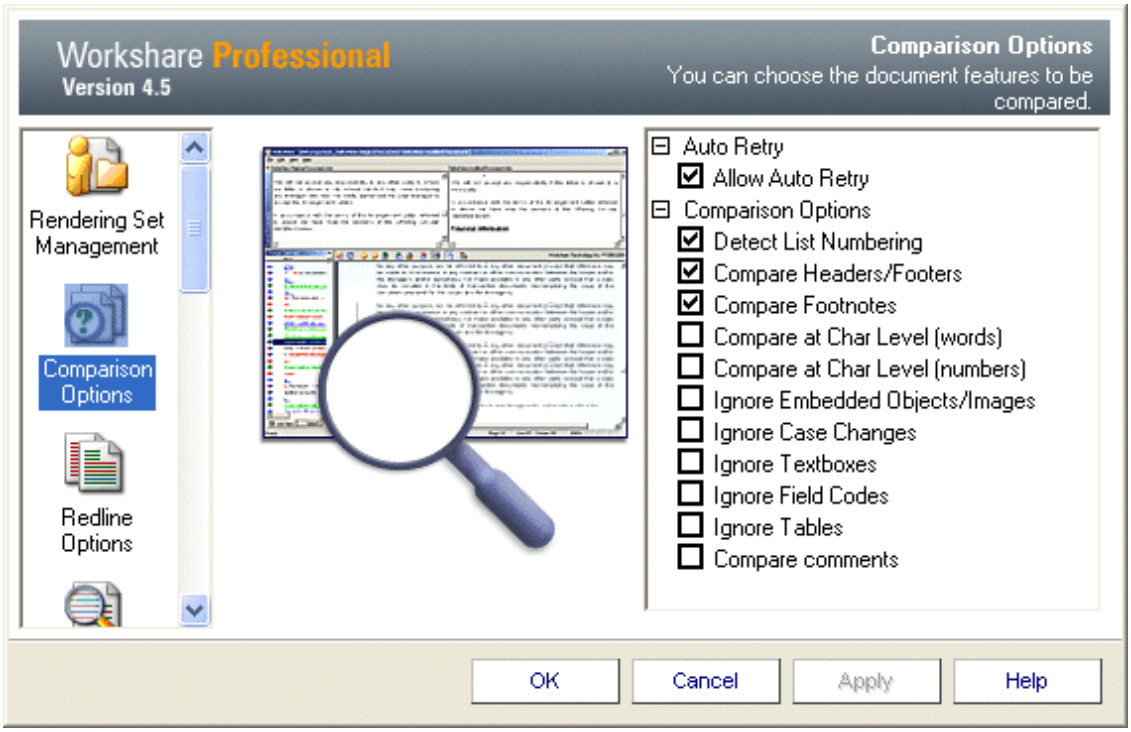
The parameters for rendering sets are grouped into the following categories:

- Comparison Options, page 149.
- Redline Options, page 150.
- Readability Options, page 152.
- Inserted Text Format, page 154.
- Deleted Text Format, page 155.
- Moved Text Format, page 156.
- Font Change Format, page 157.
- Style Change Format, page 158.
- Table Cell Format, page 159.
- Change Numbering Format, page 161.

The categories appear in the left pane of the Rendering Set Manager. Selecting a category displays the parameters for that category in the right pane of the Rendering Set Manager. The different categories and their parameters are described in the following sections.

Comparison Options

The Comparison Options category includes parameters that enable you to customize how the compare is performed.



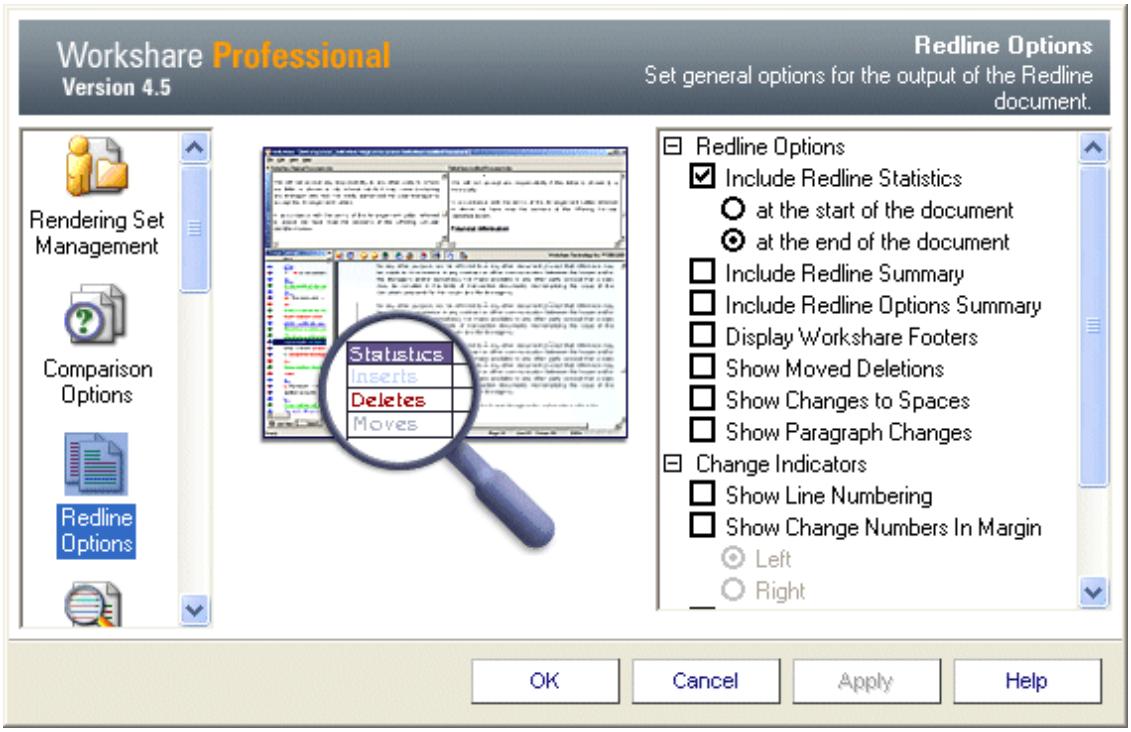
The Comparison Options parameters are described in the following table:

Parameter	Description
Allow Auto Retry	When selected, if a comparison fails for any reason then Workshare Professional DeltaView automatically attempts to perform a comparison using reduced settings. Workshare Professional DeltaView methodically and automatically disables the Comparison Options selected until it is able to perform a comparison.
Detect List Numbering	If selected, changes to automatically generated list numbers for numbered paragraphs are detected
Compare Headers/Footers	If selected, the headers and footers in the original and modified documents are compared.
Compare Footnotes	If selected, the footnotes in the original and modified documents are compared.
Compare at Char Level (words)	If selected, words that are only slightly different from each other are compared. For example, if **banana** has been changed to **bananas** - Workshare Professional DeltaView shows just an insertion of an **s** in the Redline document, rather than showing a deletion of **banana** and an insertion of **bananas**. This is intended to catch simple typing mistakes.

Parameter	Description
Compare at Char Level (numbers)	As above description, but compares numbers instead of characters.
Ignore Embedded Objects/Images	If selected, images are ignored while doing the comparison.
Ignore Case Changes	If selected, any case changes, for example, upper case to lower case, made in the modified document are ignored.
Ignore Text Boxes	If selected, any text boxes in the modified document are ignored.
Ignore Field Codes	If selected, any field codes in the modified document are ignored.
Ignore Tables	If selected, any tables in the modified document are ignored.

Redline Options

The Redline Options category includes parameters that enable you to customize how the Redline document is displayed and what information is included with the Redline document.

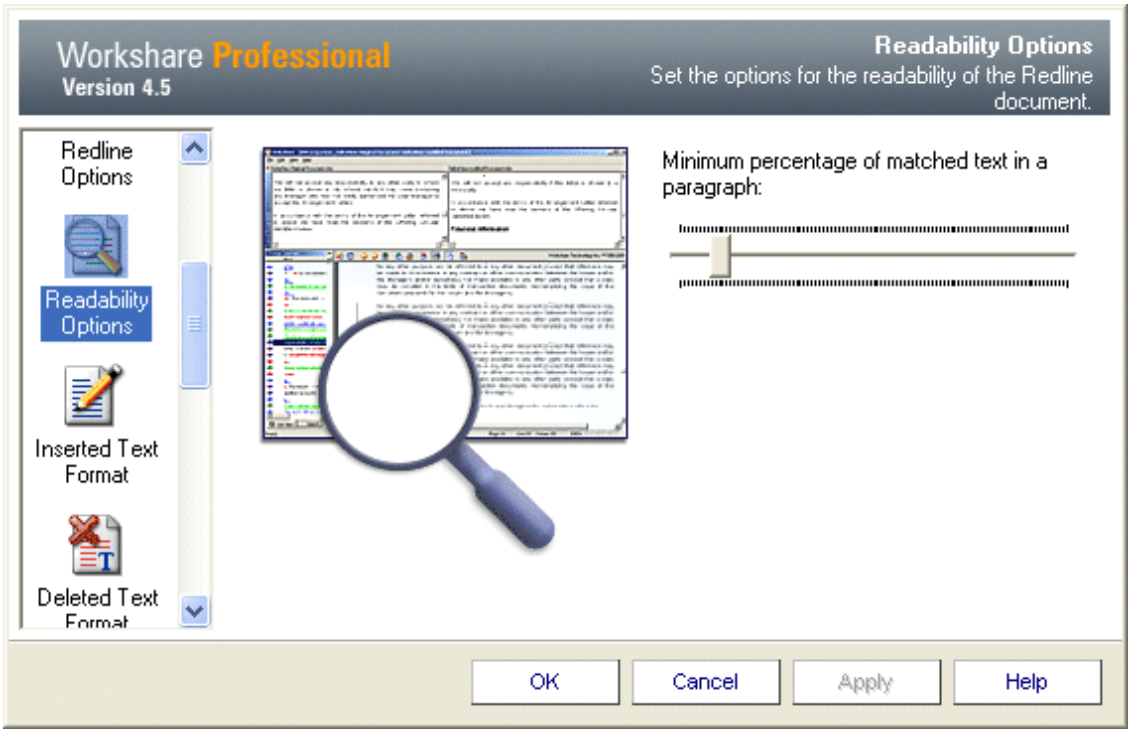


The Redline Options parameters are described in the following table:

Parameter	Description
Redline Options	
Include Redline Statistics	If selected, statistics about the changes between the original and modified documents is displayed in the Redline document. You can select to display these statistics **at the start of the document** or **at the end of the document**.
Include Redline Summary	If selected, a summary of all the changes is displayed at the end of the Redline document. The changes are hyperlinked to take you directly to the change in the Redline document.
Include Redline Options Summary	If selected, a summary of the options selected in the current rendering set is displayed at the end of the Redline document in the statistics report.
Display Workshare Footers	If selected, details about the two documents being compared are displayed in the footer of the Redline document.
Show Moved Deletions	If selected, text that was deleted from a section of the document and then subsequently moved to a new location is indicated.
Show Changes to Spaces	If selected, any extra spaces that have been added to or deleted from the modified document are indicated.
Show Paragraph Changes	If selected, paragraph markers (¶) of any extra paragraphs that have been added to or deleted from the modified document are displayed.
Change Indicators	
Show Line Numbering	If selected, the line number is displayed to the left of each line in the Redline document.
Show Change Numbers in Margin	If selected, the change number is displayed next to each change in the Redline document. You can select to display the number either in the **Left** or **Right** margin.
Show Change Bars	If selected, vertical lines to indicate a change are displayed next to each change in the Redline document. You can select to display the lines either in the **Left** or **Right** margin.
Show Hidden Text	If selected, hidden text is displayed in the Redline document.

Readability Options

The Readability category includes a parameter that enables you to set at what point insertions and deletions should no longer be marked individually but marked as an entire paragraph deleted followed by an entire paragraph inserted. The deleted paragraph is as the paragraph appears in the original document and the inserted paragraph is as the paragraph appears in the modified document.



For example, the following paragraph showing numerous deletions and insertions is quite difficult to read:

> **DeltaView** ~~**Redline with** **Table of** **Contents:** (Vendor)When performing a redline where the document contains an~~**contents issue:** An error occurs in the number of bullet points when DeltaView does a redline on a document where the table of contents is automatically generated ~~Table of Contents, the DeltaView output does not number the sections properly. This happens~~ in ~~DeltaView or if the file format is *.wdf. **Workaround:** Save the redline~~Word. Workaround: Save the table of contents in as a ~~new document or email the redline as a Word document, it formats correctly. We are working with the vendor for a resolution~~DOC file and open it in Word before printing.

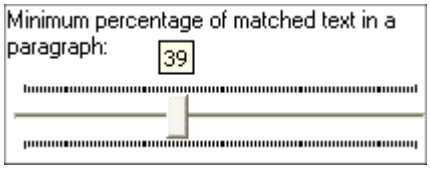
It would be much easier to read this paragraph if it was presented as the entire paragraph deleted followed by a new paragraph inserted, as follows:

> ~~**DeltaView Redline with Table of Contents:** (Vendor)When performing a redline where the document contains an automatically generated Table of Contents, the DeltaView output does not number the sections properly. This happens in DeltaView or if the file format is *.wdf. **Workaround:** Save the redline as a new document or email the redline as a Word document, it formats correctly. We are working with the vendor for a resolution.~~
>
> **DeltaView Table of contents issue:** An error occurs in the number of bullet points when DeltaView does a redline on a document where the table of contents is automatically generated in Word. Workaround: Save the table of contents in as a DOC file and open it in Word before printing.

Obviously, if there were only a few deletions and insertions in a paragraph, then the first example is easy to read.

In the Readability Options page, you can specify at what point Workshare Professional no longer marks deletions and insertions individually but marks the entire paragraph as a deletion followed by the new paragraph as an insertion. You specify this by setting a readability percentage, as follows:

In the Readability Options page, drag the slider under the **Minimum percentage of matched text in a paragraph** field to your required setting. As you drag the slider, the percentage is shown as a tool tip above the slider.



The meaning of the setting is as follows:

- With readability set at 10%, Workshare Professional will mark insertions and deletions individually unless 90% of the paragraph has changed. In other words, in most circumstances paragraphs will be displayed in the same way as the first example shown previously. Only when more than 90% of the paragraph has changed will Workshare Professional display the paragraph as the second example.
- With readability set at 50%, Workshare Professional will mark insertions and deletions individually unless 50% of the paragraph has changed. In other words, paragraphs will be displayed in the same way as the first example shown previously unless more than 50% of the paragraph has changed.
- With readability set at 90%, Workshare Professional will mark insertions and deletions individually unless 10% of the paragraph has changed. In other words, in most circumstances paragraphs will be displayed in the same way as the second example shown previously. Only when less than 10% of the paragraph has changed will Workshare Professional display the paragraph as the first example.

The default setting for readability is 10%.

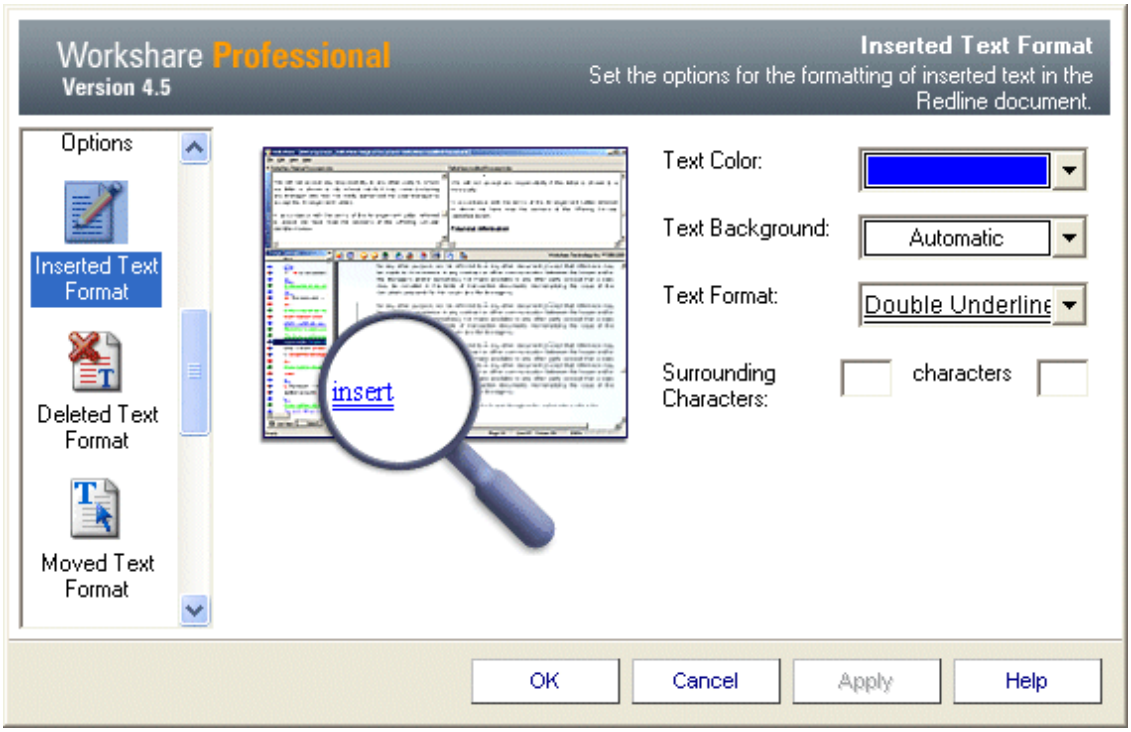
Workshare Professional looks at each paragraph separately and assesses its readability according to the number of changes in the paragraph.

NOTE: When working with tables, Workshare Professional does not treat the entire table as a paragraph. Each paragraph within each cell is treated separately.

Readability only applies to paragraphs that contain both inserted and deleted text because such paragraphs may be unclear whereas paragraphs with only insertions or deletions do not have such readability problems.

Inserted Text Format

The Inserted Text Format category includes parameters that enable you to customize how you would like inserted text to appear in the Redline document.

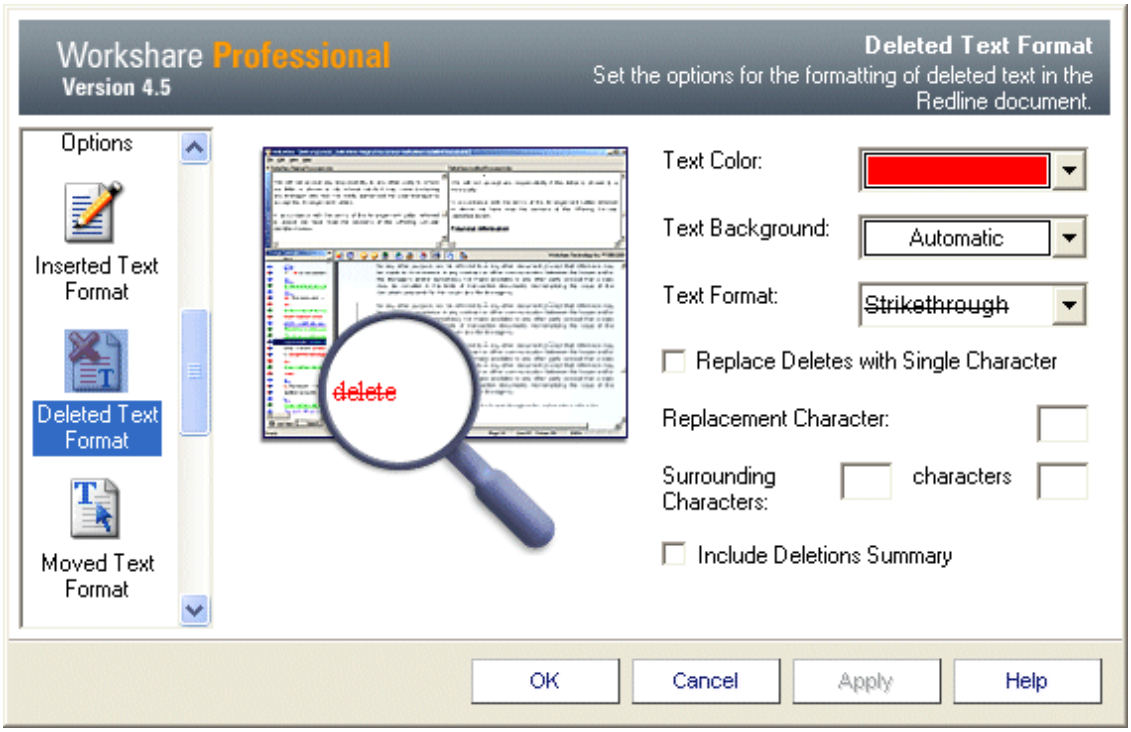


The Inserted Text Format parameters are described in the following table:

Parameter	Description
Text Color	The color of inserted text.
Text Background	The color of the background of inserted text.
Text Format	The format of inserted text. Select from Underline, Double Underline, *Italic* or ~~Strikethrough~~.
Surrounding Characters	A keyboard character to go before and after inserted text.

Deleted Text Format

The Deleted Text Format category includes parameters that enable you to customize how you would like deleted text to appear in the Redline document.



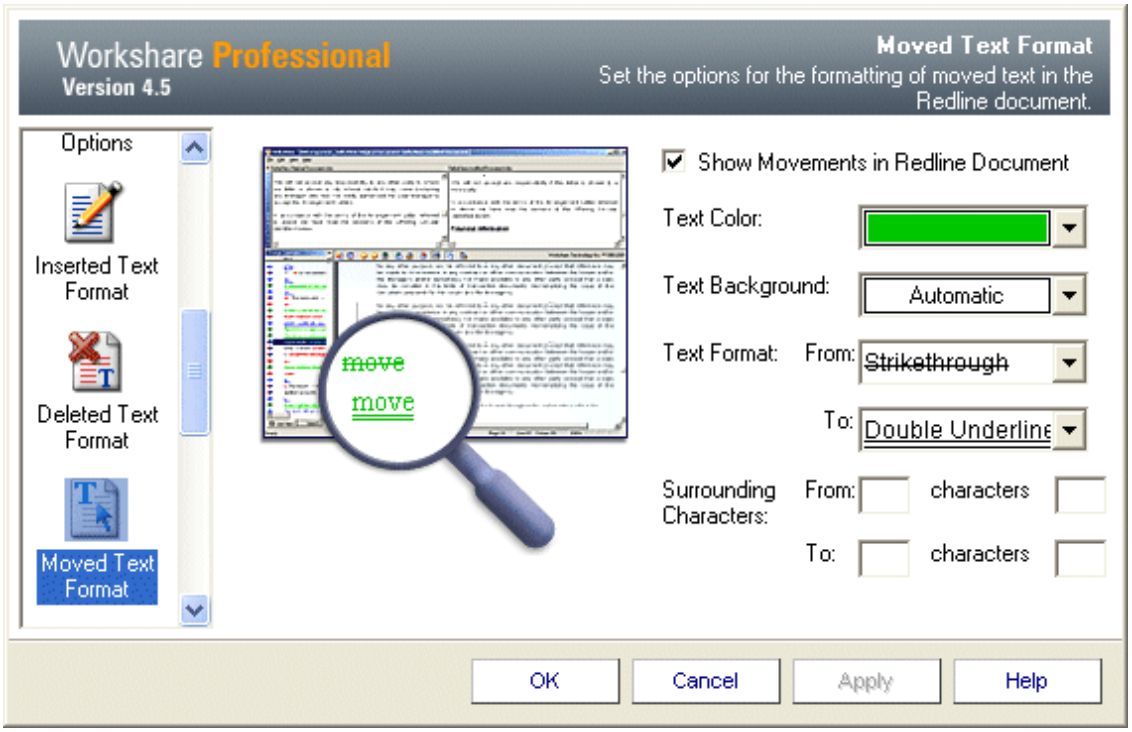
The Deleted Text Format parameters are described in the following table:

Parameter	Description
Text Color	The color of deleted text.
Text Background	The color of the background of deleted text.
Text Format	The format of deleted text. Select from Underline, Double Underline, *Italic* or ~~Strikethrough~~.
Replace Deletes with Single Character	If selected, deleted text is replaced with a single character. If you select this checkbox, enter the required character in the **Replacement Character** field. For example, if the word **compare** is deleted and the character specified is **X**, the word appears as **X**.
Replacement Character	The character used to replace deleted text. If the **Replace Deletes with Single Character** checkbox is selected, the deleted text is replaced with a single instance of the character specified. If the **Replace Deletes with Single Character** checkbox is not selected, each character in the deleted text is replaced with the character specified. For example, if the word **compare** is deleted and the character specified is **X**, the word appears as **XXXXXXX**.
Surrounding Characters	A keyboard character to go before and after deleted text.

Parameter	Description
Include Deletions Summary	If selected, a summary of deletions is included with the Redline document.

Moved Text Format

The Moved Text Format category includes parameters that enable you to customize how you would like moved text to appear in the Redline document.

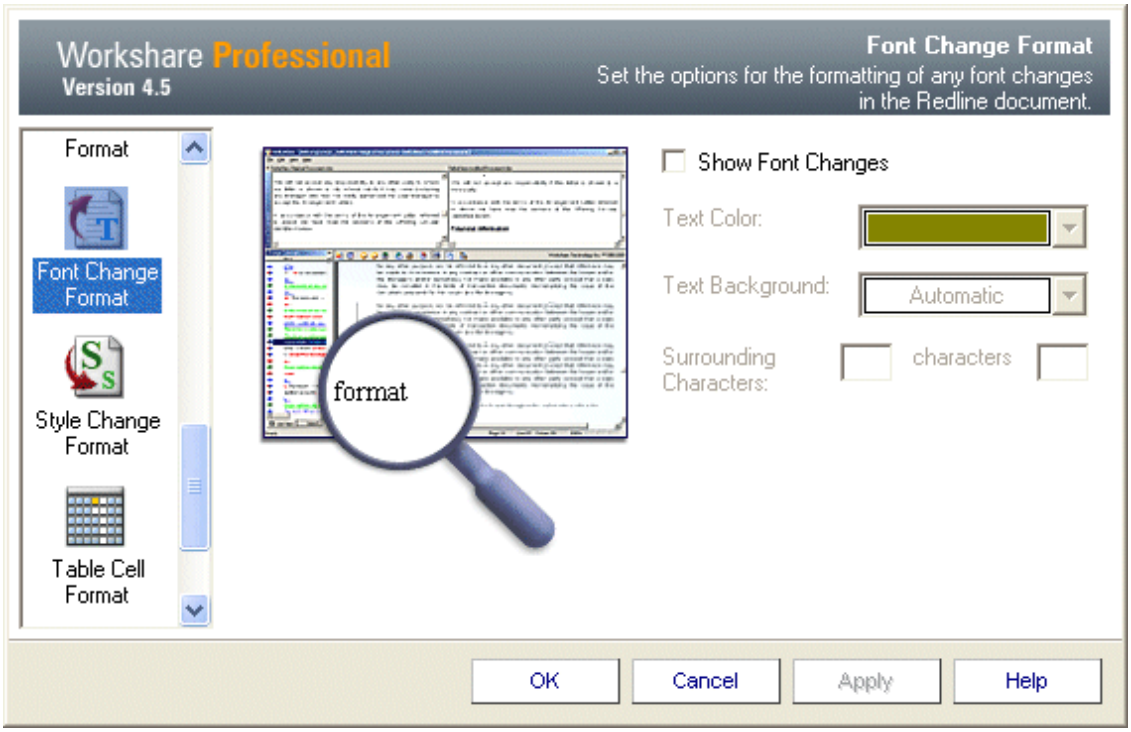


The Moved Text Format parameters are described in the following table:

Parameter	Description
Show Movements in Redline Document	If selected, moved text is shown in the Redline document. If you leave this checkbox unchecked, then any text that has been moved is displayed the same as inserted and deleted text.
Text Color	The color of moved text.
Text Background	The color of the background of moved text.
Text Format	The format of moved text. Select the format of the text in its original position from the **From** drop-down list and in its new position from the **To** drop-down list. Select from Underline, Double Underline, *Italic* or ~~Strikethrough~~.
Surrounding Characters	A keyboard character to go before and after moved text. Specify the characters to surround the text in its original position in the **From** fields and in its new position in the **To** fields.

Font Change Format

The Font Change Format category includes parameters that enable you to customize how you would like any font changes to appear in the Redline document.



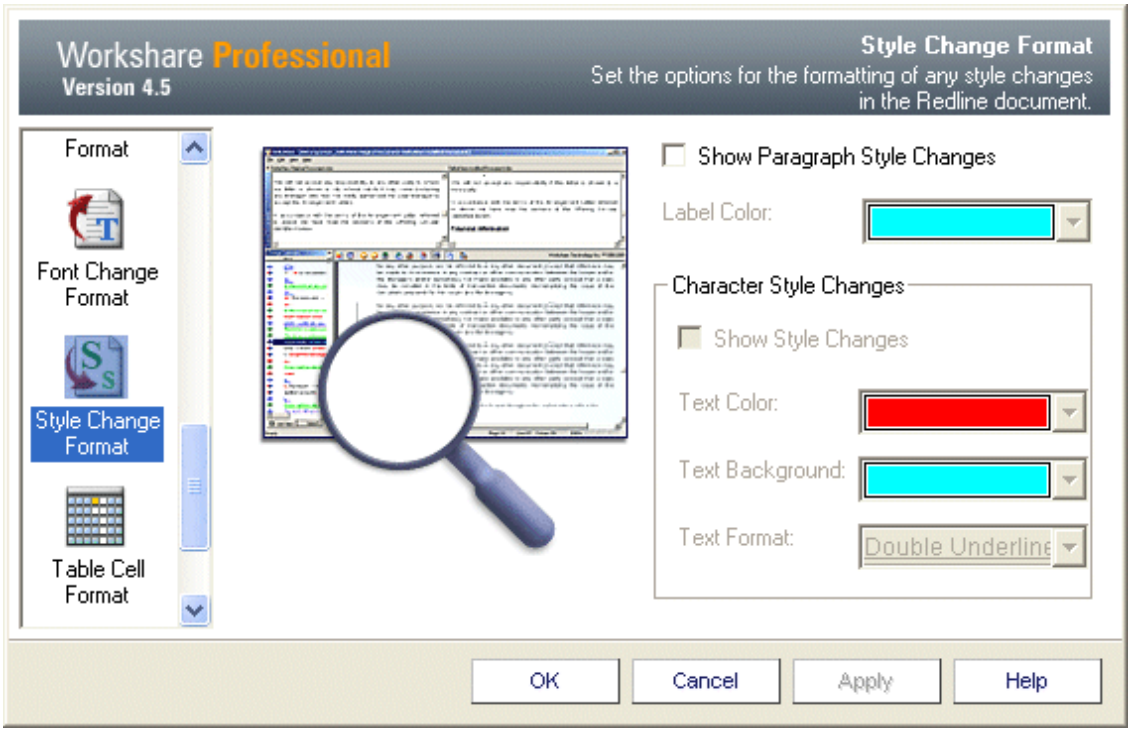
The Font Change Format parameters are described in the following table:

Parameter	Description
Show Font Changes	If selected, font changes are shown in the Redline document.
Text Color	The color of font changes.
Text Background	The color of the background of font changes.
Surrounding Characters	A keyboard character to go before and after font changes.

NOTE: Insertions and deletions override any font changes. For example, if the modified document has new inserted text in a different font, it appears as inserted text and not as font change text.

Style Change Format

The Style Change Format category includes parameters that enable you to customize how you would like any style changes to appear in the Redline document.



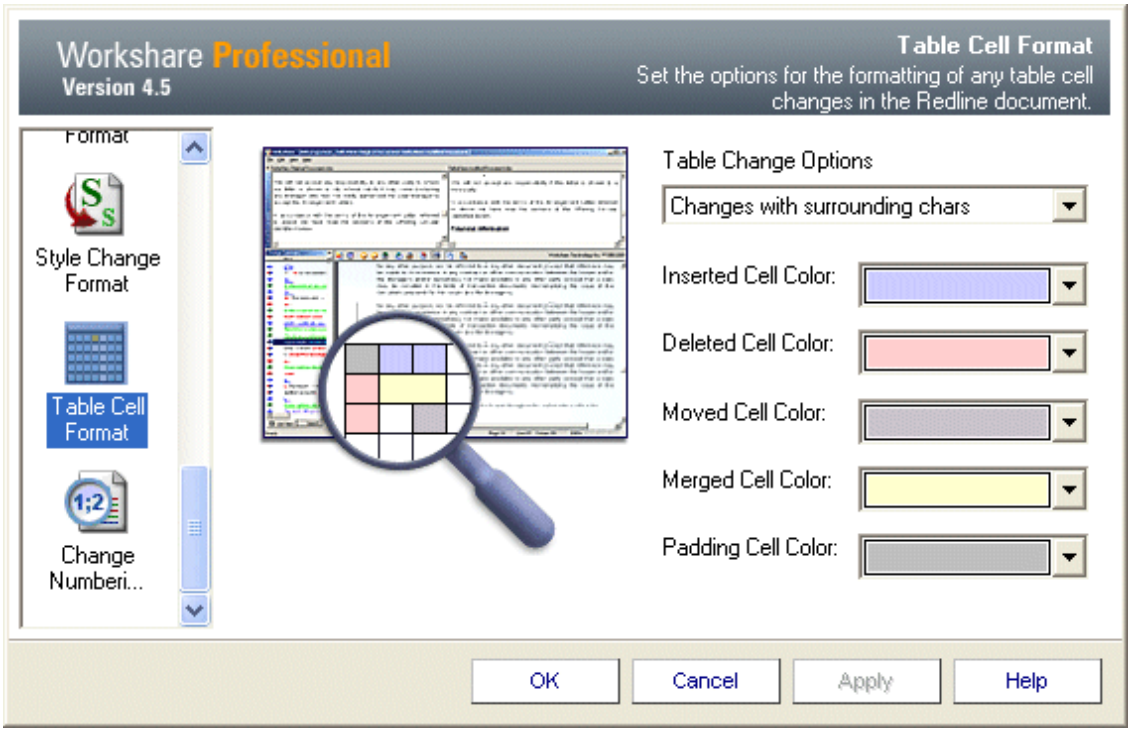
The Style Change Format parameters are described in the following table:

Parameter	Description
Show Paragraph Style Changes	If selected, paragraph style changes are shown in the Redline document. Paragraph style changes are indicated in words, for example, **normal to heading two**.
Label Color	The color of text in paragraphs where the paragraph style has changed.
Character Style Changes	
Show Style Changes	If selected, character style changes are shown in the Redline document.
Text Color	The color of character style changes.
Text Background	The color of the background of character style changes.
Text Format	The format of character style changes. Select from Underline, Double Underline, *Italic* or ~~Strikethrough~~.

NOTE: Changes to heading styles are also shown in the statistics report at the end of the Redline document.

Table Cell Format

The Table Cell Format category includes parameters that enable you to customize how you would like any format changes in tables to appear in the Redline document.



The Table Cell Format parameters are described in the following table:

Parameter	Description
Table Change Options	The way changes in tables are indicated. You can select from the following: **Changes with surrounding chars**, **Changes without surrounding chars**, **Whole original and modified tables**, **Whole modified table only** or **Whole modified table only (unmarked)**. Selecting **Whole modified table only (unmarked)**, the modified table is shown in the Redline document as a new table with no changes marked. Selecting **Whole modified table only**, the modified table is also shown in the Redline document as a new table but it is shown as an insertion.
Inserted Cell Color	The color of inserted cells.
Deleted Cell Color	The color of deleted cells.
Moved Cell Color	The color of moved cells.
Merged Cell Color	The color of merged cells.
Padding Cell Color	The color of padded cells.

What are Padded Cells?

Padded cells occur when an insert and delete have occurred within a table, a cell becomes both an insert **and** a delete; therefore it creates a padded cell.

Original Table

Cell 1	Cell 2	Cell 3
Cell 4	Cell 5	Cell 6

Modified Table

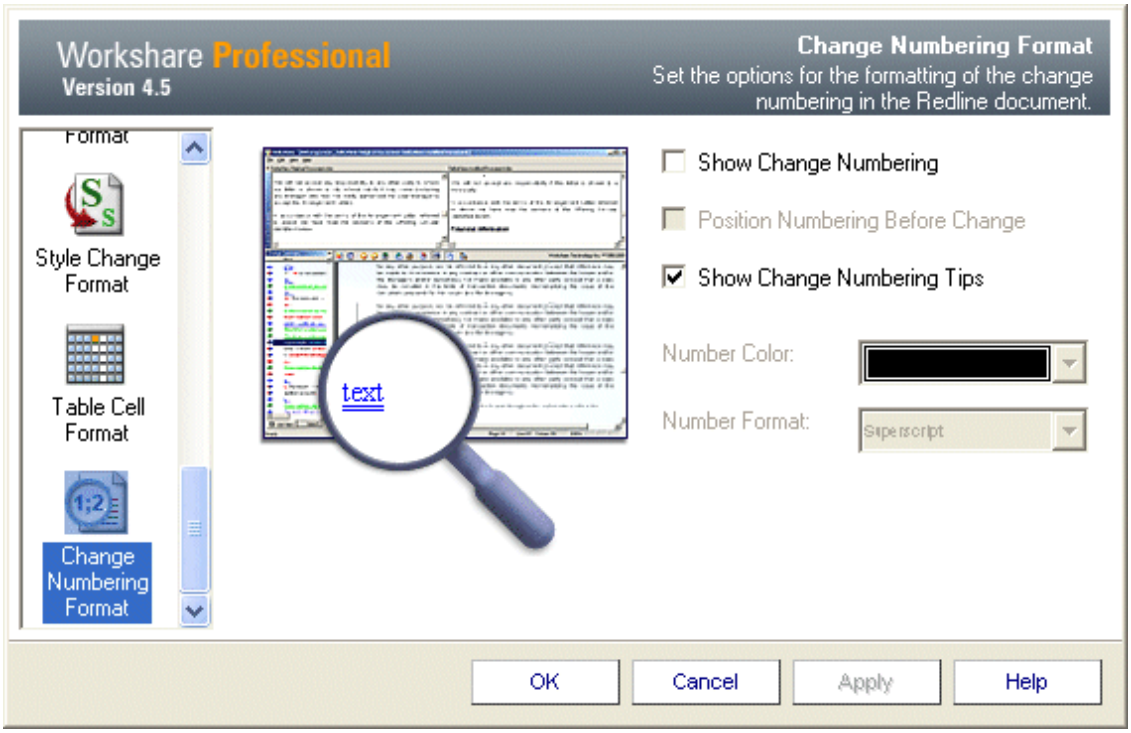
Cell 1	Cell 3
Cell A	Cell B
Cell 4	Cell 6

Rendered Table

Cell 1	~~Cell 2~~	Cell 3
Cell A	PADDED CELL	Cell B
Cell 4	~~Cell 5~~	Cell 6

Change Numbering Format

The Change Numbering Format category includes parameters that enable you to select whether change numbers are shown in the Redline document and, if so, how they appear.



The Change Numbering Format parameters are described in the following table:

Parameter	Description
Show Change Numbering	If selected, the number of the change is displayed next to each change in the Redline document.
Position Numbering Before Change	If selected, the change number is displayed before the change. If not selected, the change number is displayed after the change. It is recommended to position the change number before the change as footnotes often appear after text. This reduces confusion. This parameter is only enabled when **Show Change Numbering** is selected.
Show Change Numbering Tips	If selected, tool tips are displayed when you position the cursor over change numbers.
Number Color	The color of change numbers. This parameter is only enabled when **Show Change Numbering** is selected.
Number Format	The format of change numbers. Select from a range of formats, including **Superscript** or **Bold**. This parameter is only enabled when **Show Change Numbering** is selected.

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